eSTART

User Guide for

Leave Administrators

February 2016

General Information About This Manual

This manual is designed to provide State employees with an overview of the eSTART Time and Attendance System. This manual provides basic procedures; however, you may need to seek clarification on specific agency procedures or rules from your agency personnel manager or supervisor.

Nothing in this handbook should be construed to amend any laws, regulations, policies or procedures established by the State of Alabama or specifically the Alabama State Personnel Department.

Certain procedures contained within this manual are subject to change or revision without prior notice. Employees will be notified as soon as possible when changes or revisions occur.

All leave accruals and usages in eSTART are estimates and/or projections that are based on the concept that all employees earn leave and have leave to use. These estimates and projections may not be accurate.

Table of Contents

Core Leave Concepts 1
Importance 1
The Leave Process 2
Roles and Responsibilities 3
Log On and Workspaces 4
Managing Leave 5
Exploring Leave Tools in eSTART 5
Accessing Leave Views 6
Using the Tools in Leave Views 7
Exploring the Leave Hours View 8
Exploring the Leave Cases View 10
New or Submitted Leave Cases 12
Check Eligibility Screen 14
Bypass Eligibility Check Screen 15
Documents Screen 16
Document Status Screen 20
Frequency & Duration Screen 21
Notifications Screen 22
Employment Status Screen 22
Leave Rules Screen 23
Projecting and Committing Time from the Leave Calendar 24
Committing Time for a Continuous Case 26
Removing Time Committed on a Holiday 30
Other Types of Leave Cases 35
FMLA Long Leave Without Pay 35
Non-FMLA Long Leave Without Pay 36
Military Leave 37
Generating Leave Reports 39
Sample Leave Reports 42

Intentionally Left Blank

Core Leave Concepts

Importance

Purpose

It is important that the State of Alabama's leave policy rules are consistently and accurately administered. To make this happen, employees' paid and unpaid leave should be managed in an efficient and timely manner. The Leave application supports the ability to perform leave administration tasks.

eSTART Leave:

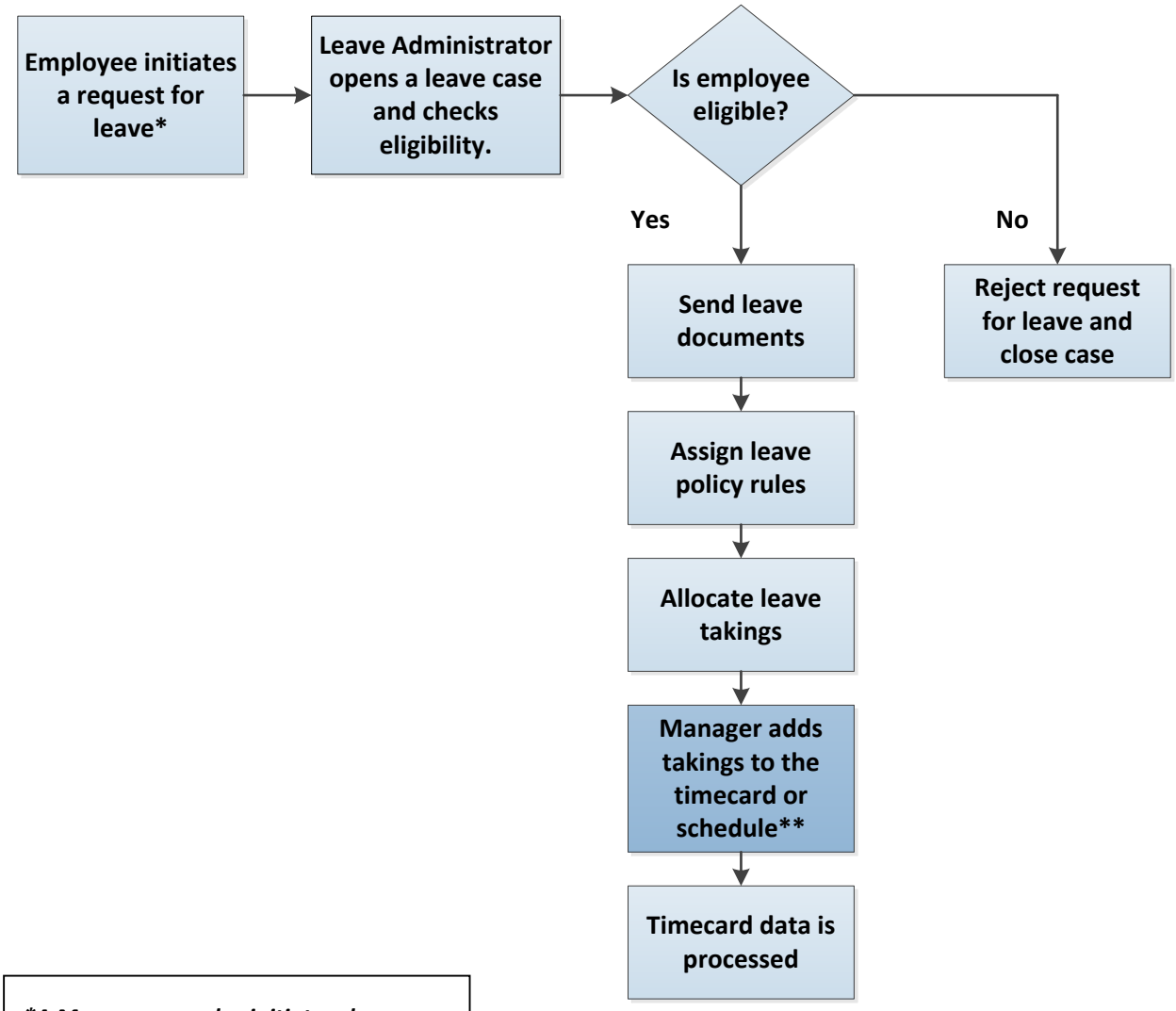
- Automates the process of administering leave policies.
- Assists the State of Alabama in achieving compliance with required federal and state mandates.

The Leave Process

Purpose

The Leave process automates the administering and tracking of paid and unpaid leave policies. Administrators can easily track both continuous and intermittent leave. In addition to centralizing administration of leave policies throughout the State of Alabama, employees benefit from the consistent application of leave policies to individual leave cases.

The following illustration shows the high-level process for administering leave cases.



A Manager can also initiate a leave request on behalf of the employee.

****The Manager may commit leave to the timecard. An employee may submit a time off request for an open and approved case.***

Roles and Responsibilities

Purpose

Each employee and manager has responsibilities that are important in the leave process. Each person's role determines his or her responsibilities, and the tasks that he or she performs in the application.

Common Employee Tasks

On an as-needed basis, employees perform the following tasks:

- Submit new leave case requests.
- Request time off for an open and approved leave case.
- Provide required leave documentation.
- Submit requests for additional leave, as needed.

Common Manager Tasks

On an as-needed basis, department managers perform the following tasks:

- Monitor leave events through leave views.
- Enter hours for employees' leave cases.
- Submit a leave case for an employee.
- Run leave reports

Common Leave Administrator Tasks

On an as-needed basis, typical Leave Administrator tasks include:

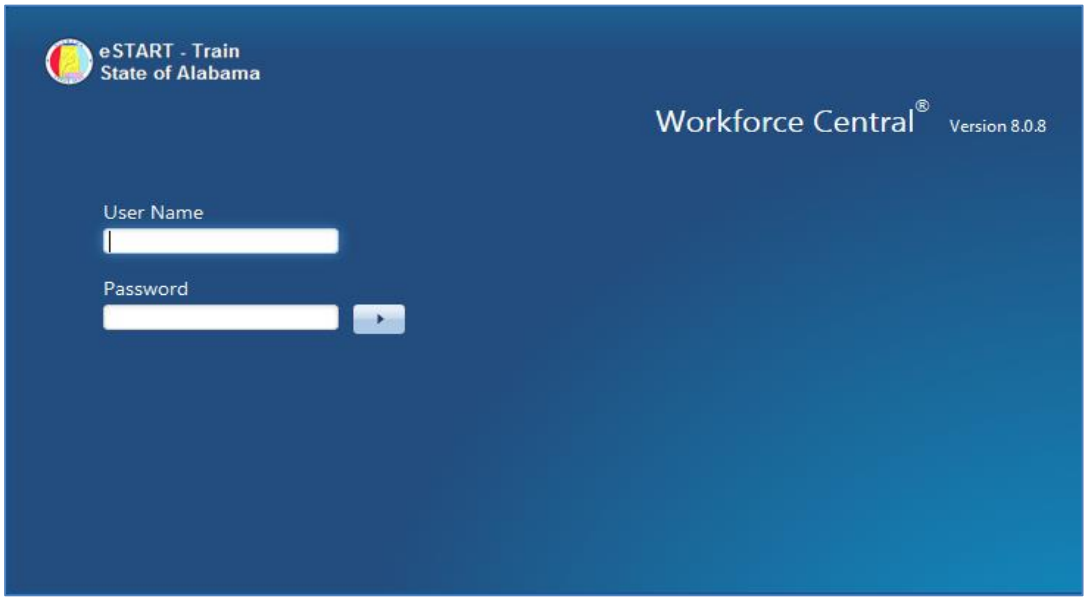
- Determine eligibility and open leave cases.
- Administer open leave cases, including documentation.
- Enter hours for employees' continuous leave cases.
- Run leave reports.

Log On and Workspaces

Purpose

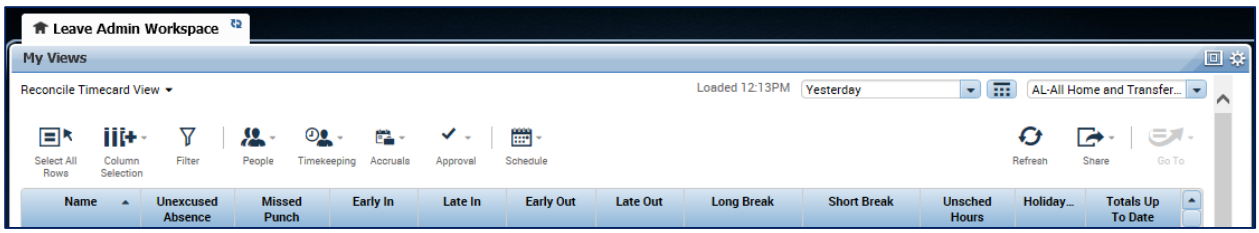
The eSTART log on page provides access to all the features of the eSTART application where you perform your administrator tasks.

Log on to the application.

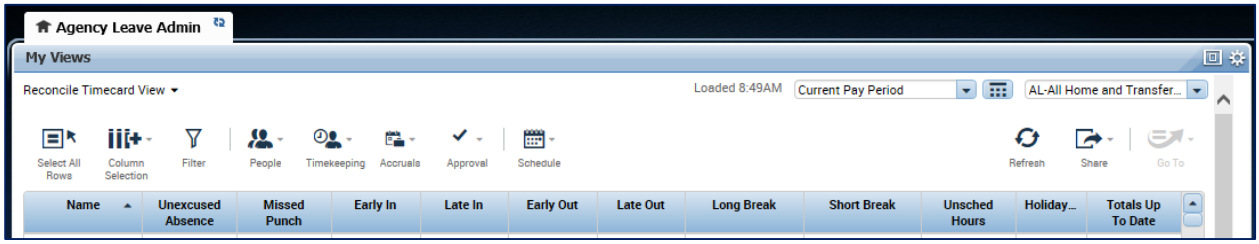


Workspaces

The default workspace for an agency administrator or timekeeper will be the Agency Admin workspace. This view will display up to 5,000 employees. If your agency has more than 5,000 employees, HyperFinds may be created to retrieve a more manageable number of employees.



An agency administrator or timekeeper may also be a Leave Administrator. The default workspace for a dual role administrator will be the Agency Leave Admin workspace, which allows access to the Leave widgets. There is also a Leave Workspaces on the Workspaces carousel.



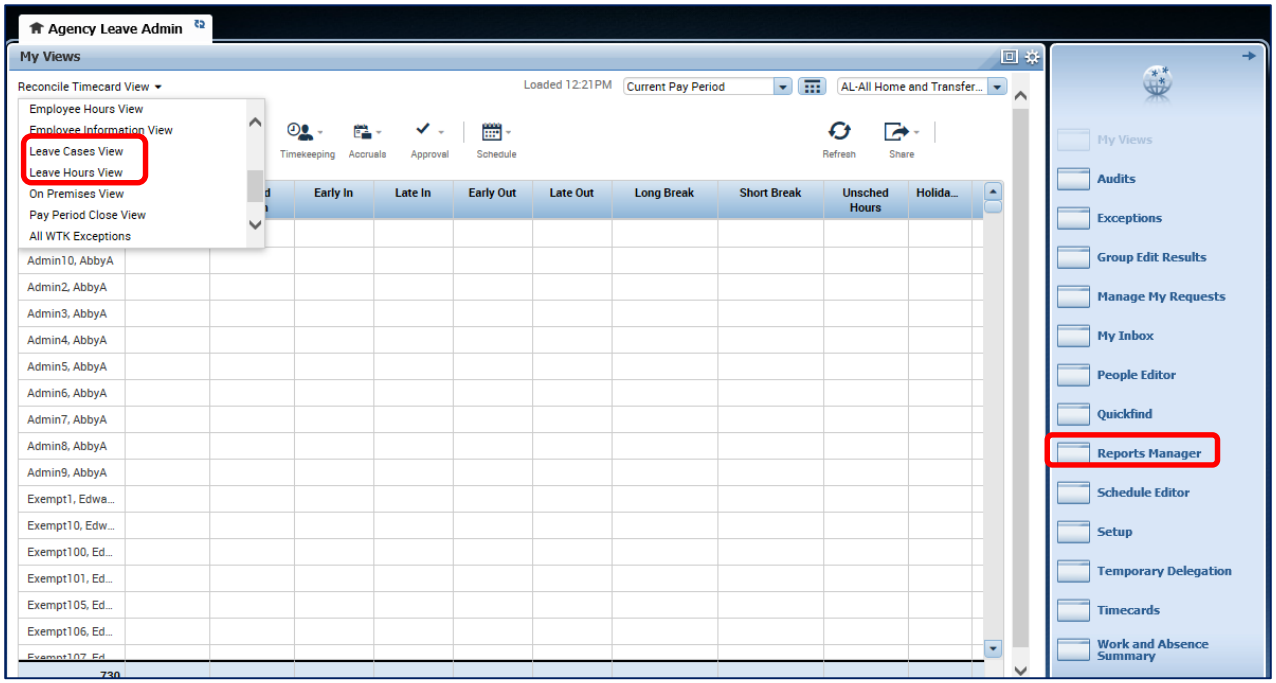
Managing Leave

Exploring Leave Tools in eSTART

Purpose

The navigator is your starting point for creating and maintaining your employees' time and leave information. There are three key tools available to assist you in performing common leave tasks, such as opening a new leave case, entering your employees' leave takings, and monitoring leave cases.

Key Leave Tools



NOTE: The view above is the default view for an Agency/Leave Administrator.

Navigator area	Description
Manage Leave	Use the Manage Leave to review incoming leave messages and process leave requests.
My Inbox	Use My Inbox to view messages pertaining to Leave Cases. If an administrator uses an Agency email account, the message will be received in there as well.
My Views	Access the My Views workspace in eSTART to view Leave Views such as **Leave Hours View** and **Leave Cases View**. You can also use this workspace to access employee timecards for purposes of entering leave time for employees.
Reports Manager	Access the Reports Manager workspace in eSTART to run and view leave reports, such as the Leave Hours Detail and Leave Hours Summary reports.

Accessing Leave Views

Purpose

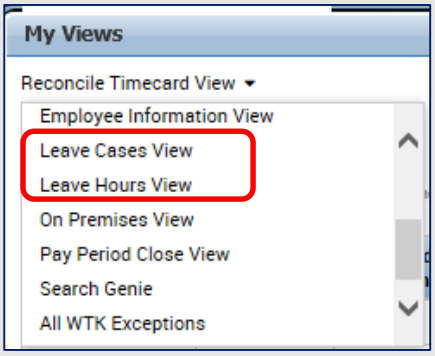
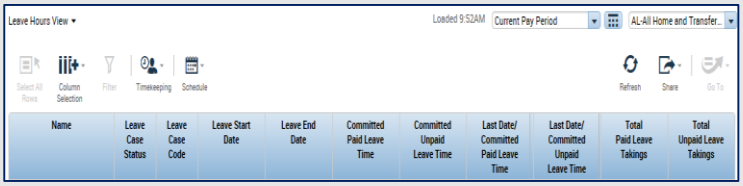
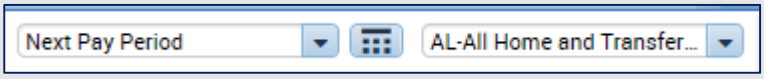
eSTART includes the following leave views:

- Leave Cases View
- Leave Hours View

You can use either of these views as a starting point for viewing and monitoring employee leave cases.

Example

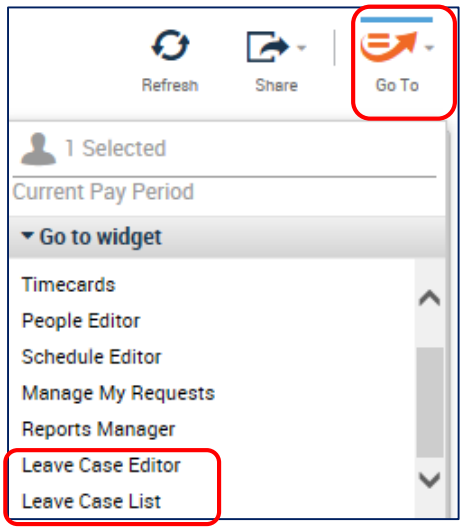
You want to access the Leave Views.

Steps		
1	Both Leave widgets are available from the **My Views** drop-down,	
2	Select **Leave Hours View.**	
3	Select **Next Pay Period** selected in the Time Period drop-down. Select **AL-All Home and Transferred-In** from the Show drop-down.	

Using the Tools in Leave Views

The **Go To** menu is located at the top right of the view, which allows you to quickly access editors and tools that display information specific to one or more employees. For example, select an employee and click the **Go To>Timecards** link to access the timecard for purposes of adding leave time; or select multiple employees and click **Go To>Reports Manager** to generate a report for only those selected employees. The **Leave Case Editor** is available from this menu to open a new case, or the **Leave Case List** is available when selecting and editing an existing case.

NOTE: This tool is common to both the **Leave Hours View** and the **Leave Cases View**.

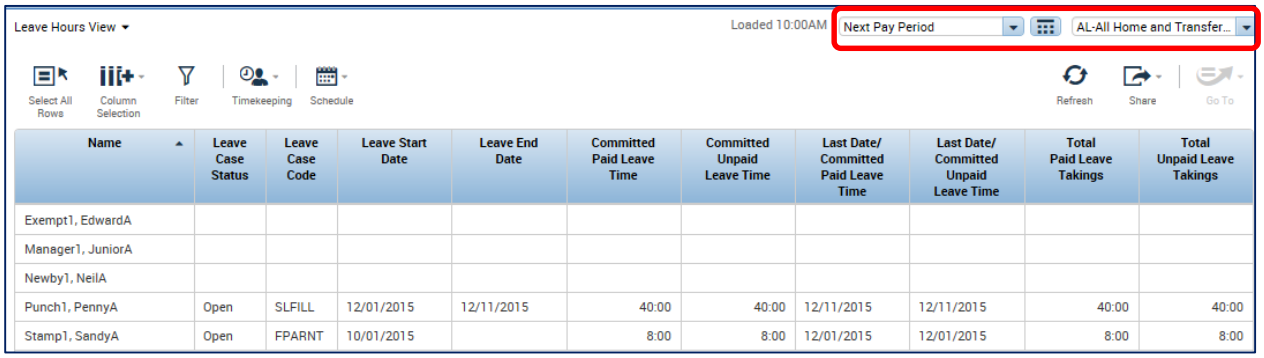


Tip

- Use the **Ctrl** key to select more than one employee not listed next to each other.
- Use the **Shift** key to select all employees listed between two employees, including the two employees.
- Click and drag the mouse to select employees.
- Choose **Actions>Select All** to select all employees.

The Show drop-down allows you select and display a specific group of employees. The default setting for the Show field when you log on is **All Home and Transferred In**, which displays all employees that report to you. You can use the Show field to further refine your selection.

The Time Period field allows you define the desired timeframe. The default setting for the Time Period field is **Current Pay Period**. You can select a predefined date period option, such as Previous Pay Period or, you can define a specific date or range of dates.



Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time	Last Date/ Committed Paid Leave Time	Last Date/ Committed Unpaid Leave Time	Total Paid Leave Takings	Total Unpaid Leave Takings
Exempt1, EdwardA										
Manager1, JuniorA										
Newby1, NeilA										
Punch1, PennyA	Open	SLFILL	12/01/2015	12/11/2015	40:00	40:00	12/11/2015	12/11/2015	40:00	40:00
Stamp1, SandyA	Open	FPARNT	10/01/2015		8:00	8:00	12/01/2015	12/01/2015	8:00	8:00

Exploring the Leave Hours View

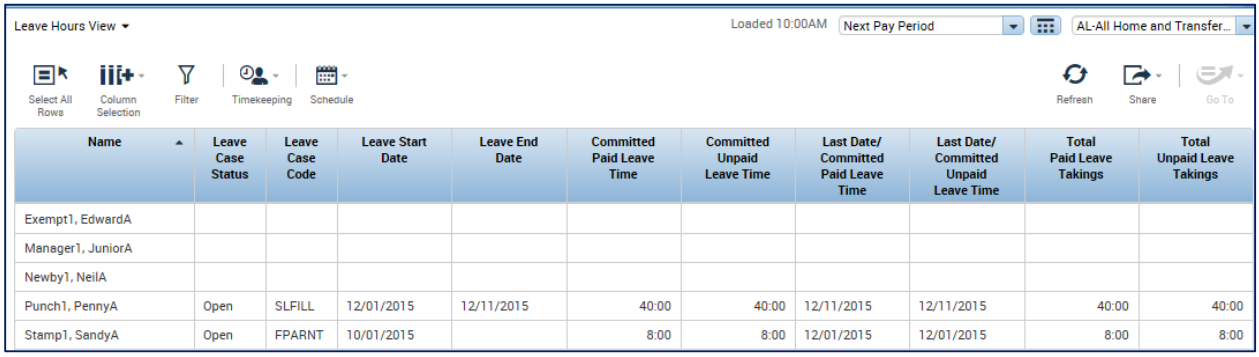
Purpose

The **Leave Hours View** is especially useful for viewing total leave hours. It also provides other information about each leave case in eSTART, including:

- Leave Case Status
- Last date of committed paid and unpaid leave time
- Leave end date (if one is provided)

This screen is used for reviewing leave cases, but may also be used to link to the **Leave Case Editor**.

Key Information in the Leave Hours View

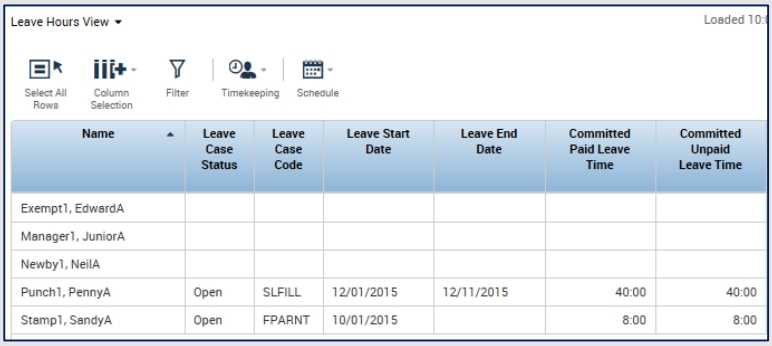
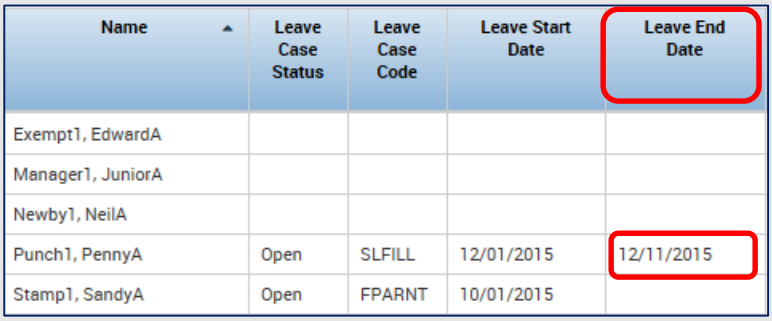
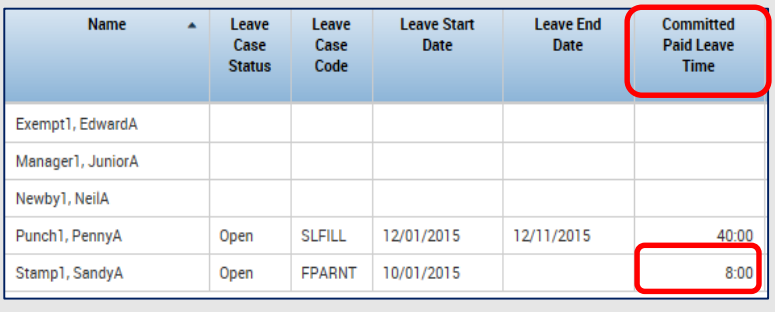


Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time	Last Date/ Committed Paid Leave Time	Last Date/ Committed Unpaid Leave Time	Total Paid Leave Takings	Total Unpaid Leave Takings
Exempt1, EdwardA										
Manager1, JuniorA										
Newby1, NeilA										
Punch1, PennyA	Open	SLFILL	12/01/2015	12/11/2015	40:00	40:00	12/11/2015	12/11/2015	40:00	40:00
Stamp1, SandyA	Open	FPARNT	10/01/2015		8:00	8:00	12/01/2015	12/01/2015	8:00	8:00

Column	Description
Leave Case Status	Indicates the status of the leave case for the specified time period. Statuses may include: Open, Closed, Submitted, or Retracted.
Leave Case Code	Type of leave, such as Self or Family.
Leave Start Date	This is the first day that the employee goes on leave of absence.
Leave End Date	This is the employee's expected return date.
Committed Paid/ Unpaid Leave Time	The Committed Paid Leave Time and Committed Unpaid Leave Time columns show the amount of paid and unpaid time that has been committed to the schedule or timecard in the selected time period.
Last Date/Committed Paid/Unpaid Leave Time	The Last Date/Committed Paid Leave Time and Last Date/Committed Unpaid Leave Time columns show the date of the last committed paid and unpaid amounts.
Total Paid/Unpaid Leave Time	The Total Paid Leave Takings and Total Unpaid Leave Takings columns show the total amount of paid and unpaid leave that an employee has taken.

Exercise

You want to know when employee **Penny Punch** will return from maternity leave and how much leave time has been committed to **Sandy Stamp's** timecard.

Steps		
1	**Note:** Data may be sorted by clicking on a column header. Click again to sort descending. A down arrow displays the sort as descending; an up arrow shows the sort as ascending.	
2	Find **Penny Punch** and view her **Leave End Date** column.	
3	Find **Sandy Stamp** and view her **Committed Paid Leave Time** column.	

Exploring the Leave Cases View

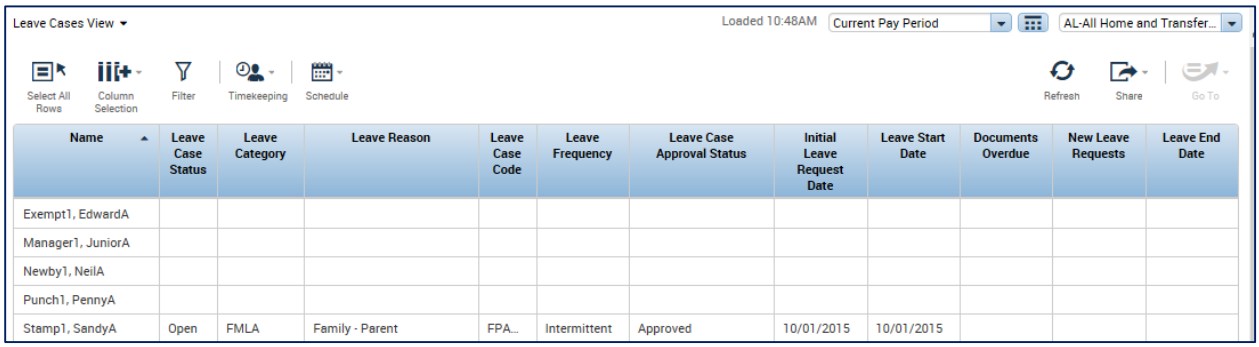
Purpose

The Leave Cases View is especially useful for viewing leave reasons and frequencies. It also provides other information about each leave case in eSTART including:

- Leave case status
- Leave category
- Initial leave request date

This screen is used for reviewing leave cases, but may also be used to link to the **Leave Case Editor**.

Key Information in the Leave Cases View



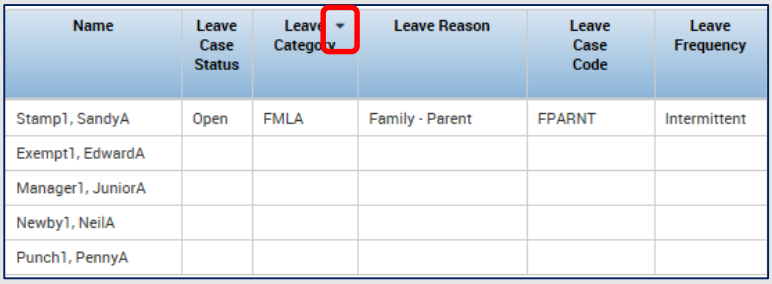
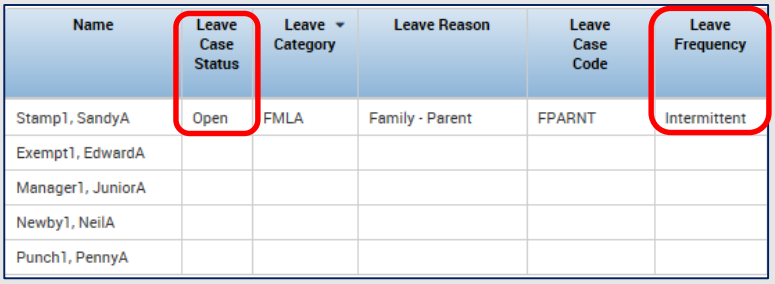
Column	Description
Leave Case Status	Indicates the status of the leave case for the specified time period. Statuses may include: Open, Closed, Submitted, or Retracted.
Leave Category	Type of leave, such as FMLA, Military or Educational.
Leave Reason	Indicates a more specific leave such as serious health condition or birth.
Leave Case Code	Type of leave, such as Self or Family.
Leave Frequency	Indicates whether the employee is on continuous or intermittent leave.
Leave Case Approval Status	Indicates whether a leave request is approved, pending or denied.
Initial Leave Request Date	Date the leave request was made.
Leave Start Date	Date leave starts for an employee.
Documents Overdue	A check in this column indicates that a document is overdue.
New Leave Requests	A check in this column indicates additional time requested on an existing leave case.
Leave End Date	The expected date on which an employee returns to work.

Exercise

You want to review the **Leave Case Status** and **Leave Frequency** of **Sandy Stamp's** case. Access the **Leave Cases View** to review Sandy's leave information in the **Current Pay period**.

The **Leave Cases View** was selected above. Remain on this page.

Steps

1	**Note:** Data may be sorted by clicking on a column header. Click again to sort descending. A down arrow displays the sort as descending; an up arrow shows the sort as ascending.	
2	Review the status and frequency information for **Sandy Stamp**.	

Name	Leave Case Status	Leave Category	Leave Reason	Leave Case Code	Leave Frequency
Stamp1, SandyA	Open	FMLA	Family - Parent	FPARNT	Intermittent
Exempt1, EdwardA					
Manager1, JuniorA					
Newby1, NeilA					
Punch1, PennyA					

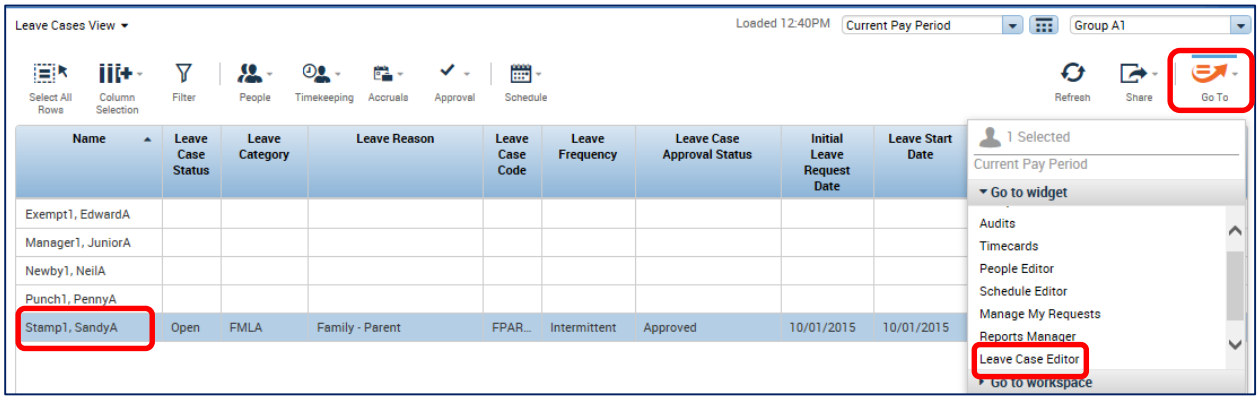
New or Submitted Leave Cases

An employee may submit a request for a case, or the Leave Administrator may enter the information for the case.

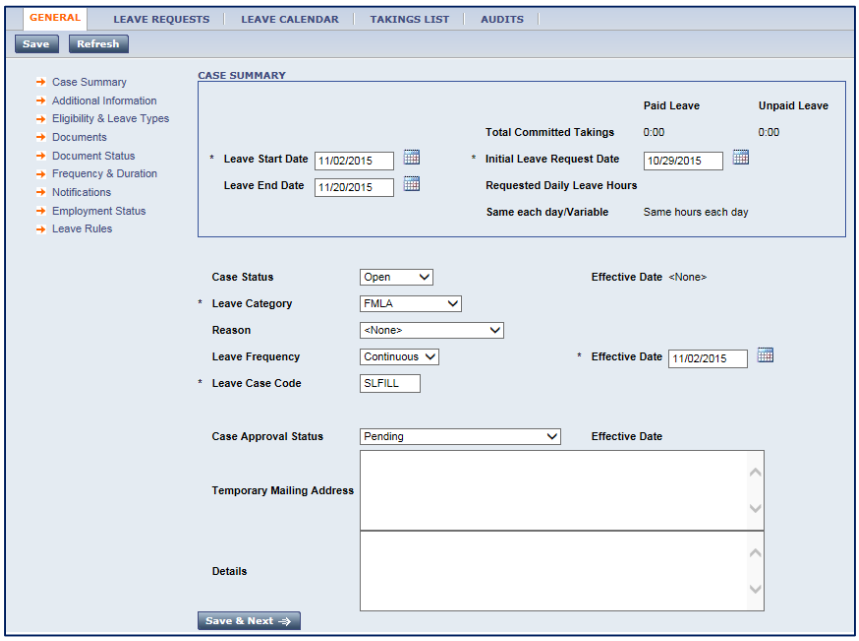
Exercise

Sandy Stamp has upcoming surgery and will be out for the next three weeks. You will open a continuous case for her.

From the **Leave Cases View,** highlight the case and select **Go To>Leave Case Editor**.

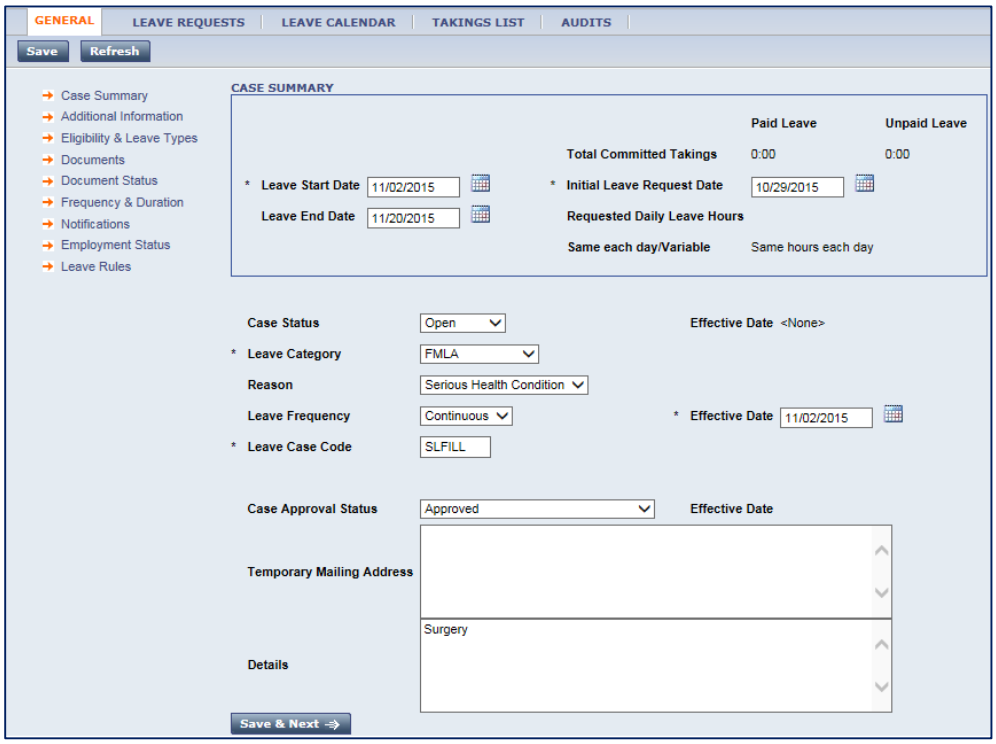


The Leave Case Editor will display, defaulted to the **General**>**Case Summary** page. If the employee submitted the case, the status displays as **Submitted** and no other options are available for edit. Else the options are editable.



NOTE: The **Leave Start Date** is the date the employee is to begin their leave. The **Initial Leave Request Date** is the date the employee gives notification of the leave.

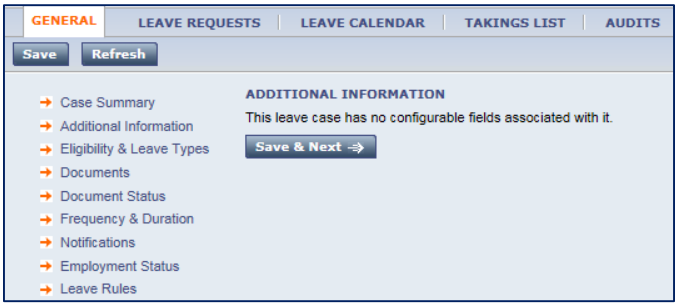
1. Enter any fields denoted with an asterisk. The other fields are optional.



2. Once all fields are updated, select **Save & Next**. This will aid in navigating through the **General** tab of the Leave case.

The **Additional Information** screen below will not be used.

3. Select **Save & Next** to continue.



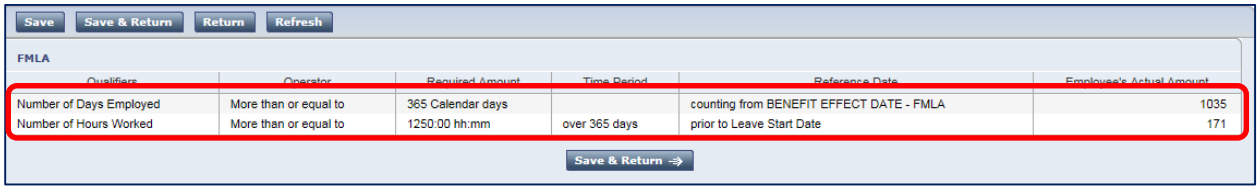
The **Eligibility & Leave Types** screen displays. This screen gives the Leave Administrator the ability to verify the employee's eligibility and their available Leave balances.

NOTE:

- During the first year that an Agency is on eSTART select **Bypass Eligibility Check** since the previous worked hours will not be available in eSTART. If **Check Eligibility** is used during this time, the eligibility check will fail.
- Once the Agency has been using eSTART for 365 days, the **Check Eligibility** feature may be utilized.

Check Eligibility Screen

Below is an example of the information displayed once the Check Eligibility function is available. This function is available after the agency has been using eSTART for one year.



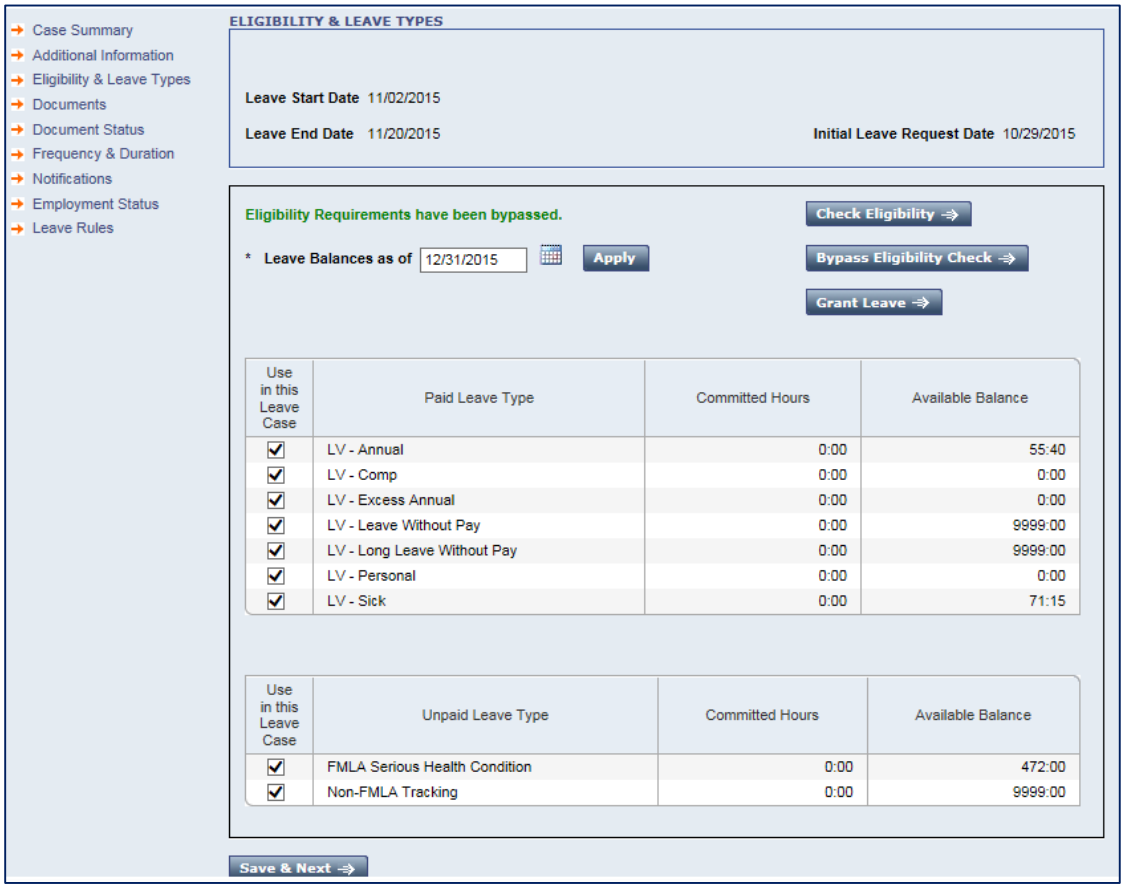
Bypass Eligibility Check Screen

Once the **Bypass Eligibility Check** option is selected, the screen below populates with the Paid and Unpaid Leave types that the employee has available.

This screen allows the user to select the types of leave that the employee chooses to use for their leave case. The check boxes may be unchecked if the specific type of leave will not be used.

NOTE: FMLA cases use leave in a certain order, which is determined by a Leave Cascade, based on the case type. See the **Extended Leave Cascade** job aid for this information. Military Leave does not use a cascade.

Also, the types listed in the **Unpaid Leave Type** section are for tracking purposes only and should remain selected.



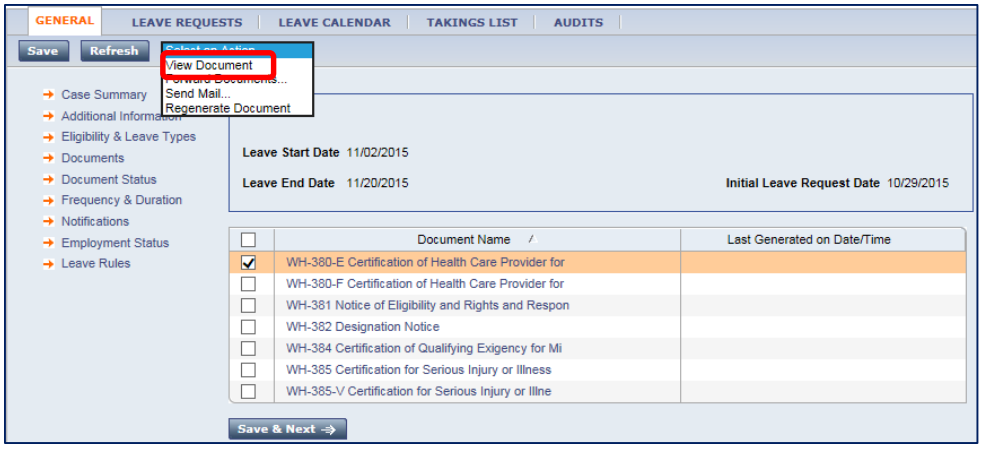
4. Select **Save & Next** to go to the **Documents** screen.

NOTE: See Appendix for specific information about **Long Leave Without Pay, Non-FMLA Long Leave Without Pay** and **Long Military Leave Without Pay** types.

Documents Screen

The **Documents** screen is used to create and view documents that are associated with the Leave case for the employee.

5. Select a document to be generated for the employee.
6. From the **Select an Action** drop-down, select **View Document**.

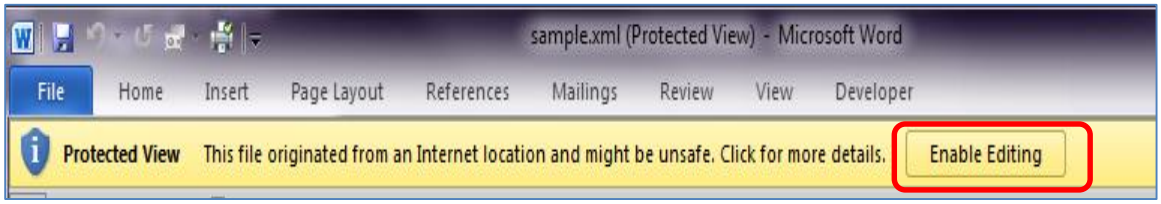


The message below displays at the bottom of the page.

7. Select **Open**.

The selected document opens for viewing and will be populated with the appropriate case information, as in the sample below. It will open in Protected View.

8. Select the **Enable Editing** button in Microsoft Word. This will allow the document to be saved.



Certification of Health Care Provider for Employee's Serious Health Condition (Family and Medical Leave Act)

U.S. Department of Labor
Wage and Hour Division

U.S. Wage and Hour Division

OMB Control Number: 1235-0003
Expires: 2/28/2015

SECTION I: For Completion by the EMPLOYER

INSTRUCTIONS to the EMPLOYER: The Family and Medical Leave Act (FMLA) provides that an employer may require an employee seeking FMLA protections because of a need for leave due to a serious health condition to submit a medical certification issued by the employee's health care provider. Please complete Section I before giving this form to your employee. Your response is voluntary. While you are not required to use this form, you may not ask the employee to provide more information than allowed under the FMLA regulations, 29 C.F.R. §§ 825.306-825.308. Employers must generally maintain records and documents relating to medical certifications, recertifications, or medical histories of employees created for FMLA purposes as confidential medical records in separate files/records from the usual personnel files and in accordance with 29 C.F.R. § 1630.14(c)(1), if the Americans with Disabilities Act applies.

Employer name and contact: Click here to enter text.

Employee's job title: Click here to enter text. Regular work schedule: Click here to enter text.

Employee's essential job functions: Click here to enter text.

Check if job description is attached: ☐

SECTION II: For Completion by the EMPLOYEE

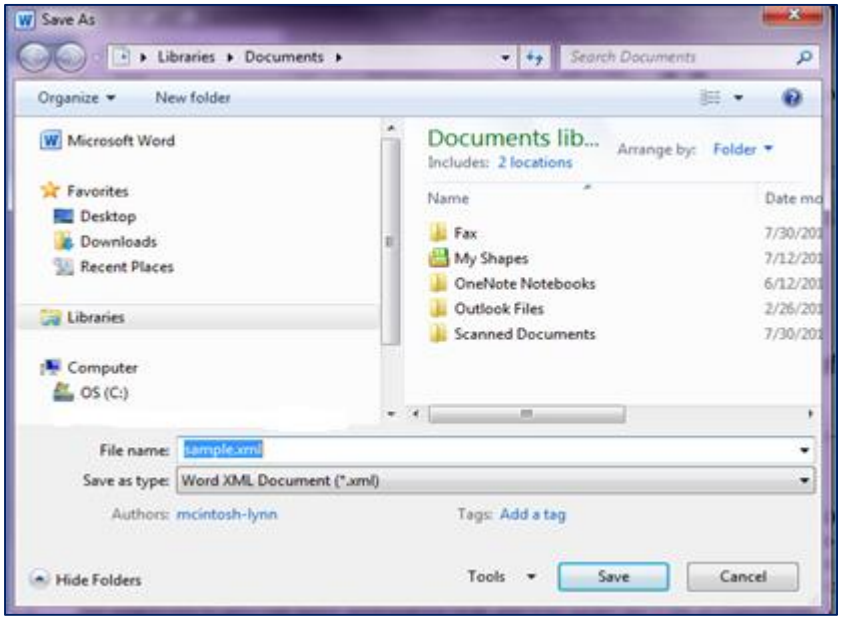
INSTRUCTIONS to the EMPLOYEE: Please complete Section II before giving this form to your medical provider. The FMLA permits an employer to require that you submit a timely, complete, and sufficient medical certification to support a request for FMLA leave due to your own serious health condition. If requested by your employer, your response is required to obtain or retain the benefit of FMLA protections. 29 U.S.C. §§ 2613, 2614(c)(3). Failure to provide a complete and sufficient medical certification may result in a denial of your FMLA request. 20 C.F.R. § 825.313. Your employer must give you at least 15 calendar days to return this form. 29 C.F.R. § 825.305(b).

Your name: Stamp1, SandyB

First: SandyB Middle: Last: Stamp1

Before sending to the employee, key the applicable data in the fields for each form. Then save the document.

9. Select **File>Save As.** The **Save As** screen displays with the default file name.



10. Save the sample document with a different file name and type.

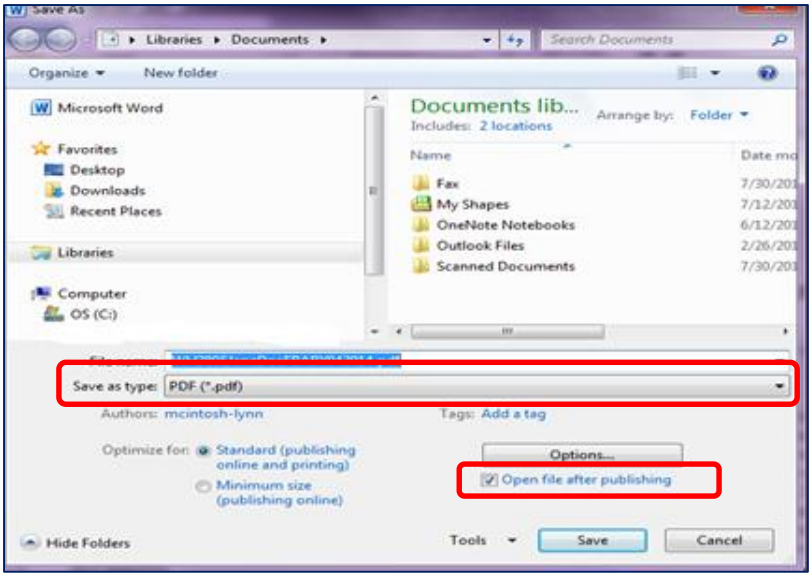
NOTE: The recommended standard for saving these documents is:

- Employee name
- Document name
- Start date of the case

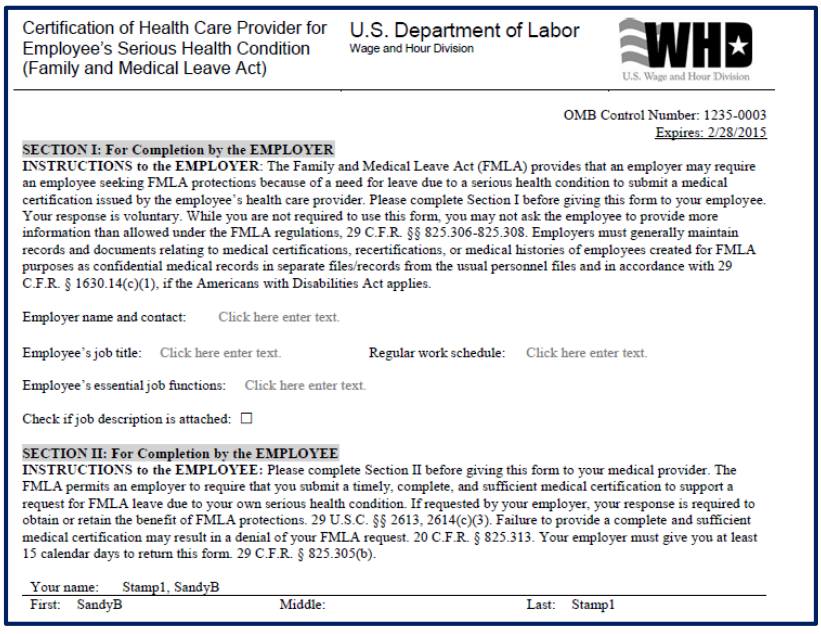
For example: **JohnDoeWH380E043014.pdf**

Change the file name to the standard, as above.

11. From the **Save as** type drop-down, select **PDF (*.pdf)**. Leave the **Open file after publishing** check box selected. Then select **Save**.



The file opens in Adobe Reader.



Certification of Health Care Provider for Employee's Serious Health Condition (Family and Medical Leave Act)

U.S. Department of Labor
Wage and Hour Division

WHD
U.S. Wage and Hour Division

OMB Control Number: 1235-0003
Expires: 2/28/2015

SECTION I: For Completion by the EMPLOYER

INSTRUCTIONS to the EMPLOYER: The Family and Medical Leave Act (FMLA) provides that an employer may require an employee seeking FMLA protections because of a need for leave due to a serious health condition to submit a medical certification issued by the employee's health care provider. Please complete Section I before giving this form to your employee. Your response is voluntary. While you are not required to use this form, you may not ask the employee to provide more information than allowed under the FMLA regulations, 29 C.F.R. §§ 825.306-825.308. Employers must generally maintain records and documents relating to medical certifications, recertifications, or medical histories of employees created for FMLA purposes as confidential medical records in separate files/records from the usual personnel files and in accordance with 29 C.F.R. § 1630.14(c)(1), if the Americans with Disabilities Act applies.

Employer name and contact: Click here enter text.

Employee's job title: Click here enter text. Regular work schedule: Click here enter text.

Employee's essential job functions: Click here enter text.

Check if job description is attached: ☐

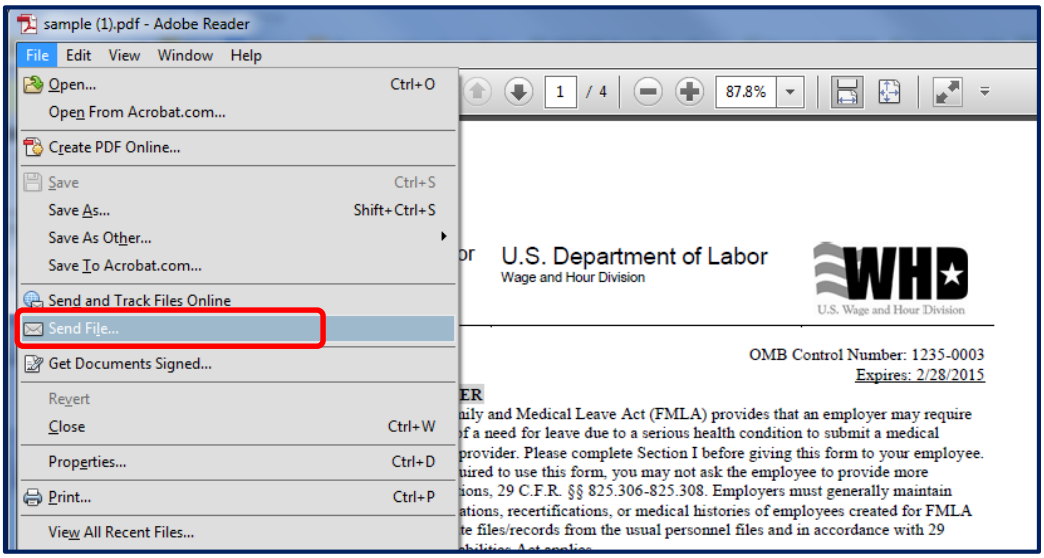
SECTION II: For Completion by the EMPLOYEE

INSTRUCTIONS to the EMPLOYEE: Please complete Section II before giving this form to your medical provider. The FMLA permits an employer to require that you submit a timely, complete, and sufficient medical certification to support a request for FMLA leave due to your own serious health condition. If requested by your employer, your response is required to obtain or retain the benefit of FMLA protections. 29 U.S.C. §§ 2613, 2614(c)(3). Failure to provide a complete and sufficient medical certification may result in a denial of your FMLA request. 20 C.F.R. § 825.313. Your employer must give you at least 15 calendar days to return this form. 29 C.F.R. § 825.305(b).

Your name: Stamp1, SandyB

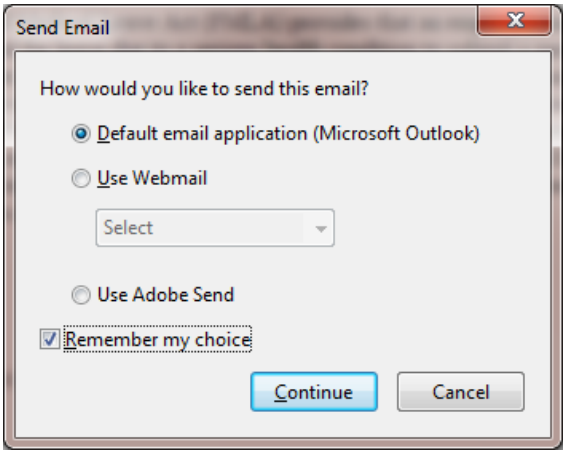
First: SandyB Middle: Last: Stamp1

12. To send the document, select **File>Send File**.



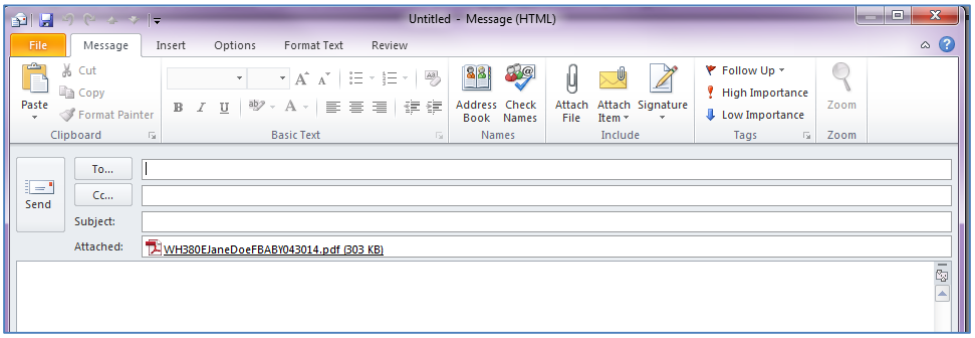
A message may display, as below.

13. If the message below displays, use the default selection and check the **Remember my choice** check box.

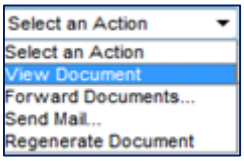


A new email message window opens with the document attached.

14. Complete the remaining information for the email and send to the employee. The employee's manager may also be copied on the email if needed.

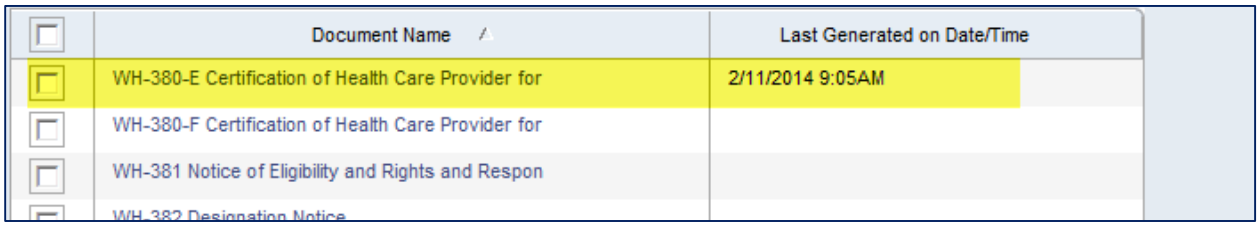


Additional Information about Sending Documents



- **View Document** opens the selected document and allows saving and sending.
- **Forward Document – Do Not Use – this will forward a document link that will not be activated.**
- **Send mail** can be used to send a reminder to the employee's Inbox and/or Agency email for any needed or missing information.
- **Regenerate Document** is referenced in the paragraph below.

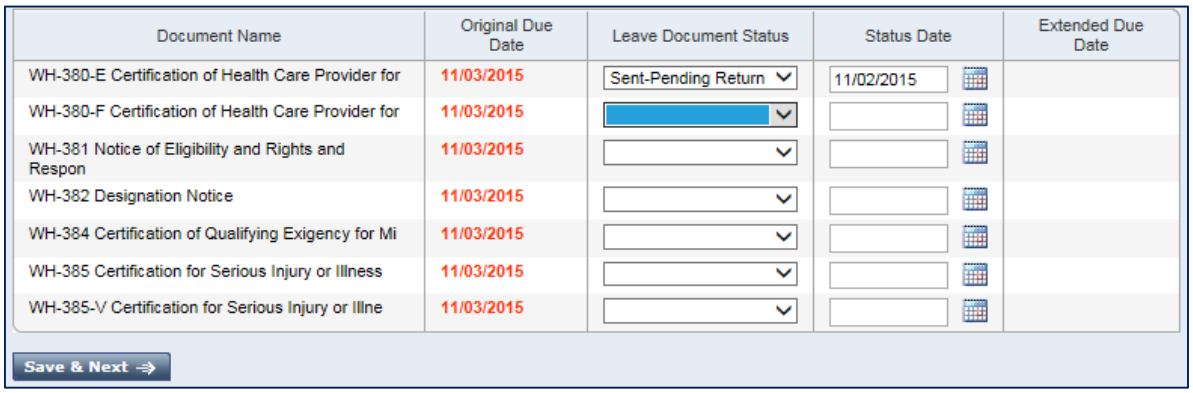
Once **View Document** is selected above and the document is viewed/saved, the date and time will populate in the **Last Generated on Date/Time** field, as below. If the document needs to be regenerated for any reason, select **Regenerate Document** from the **Select an Action** drop-down. The document may then be changed and resent to the employee if needed. The **Last Generated on Date/Time** column for the document will be updated.



15. Select **Save & Next** to go to the **Document Status** screen.

Document Status Screen

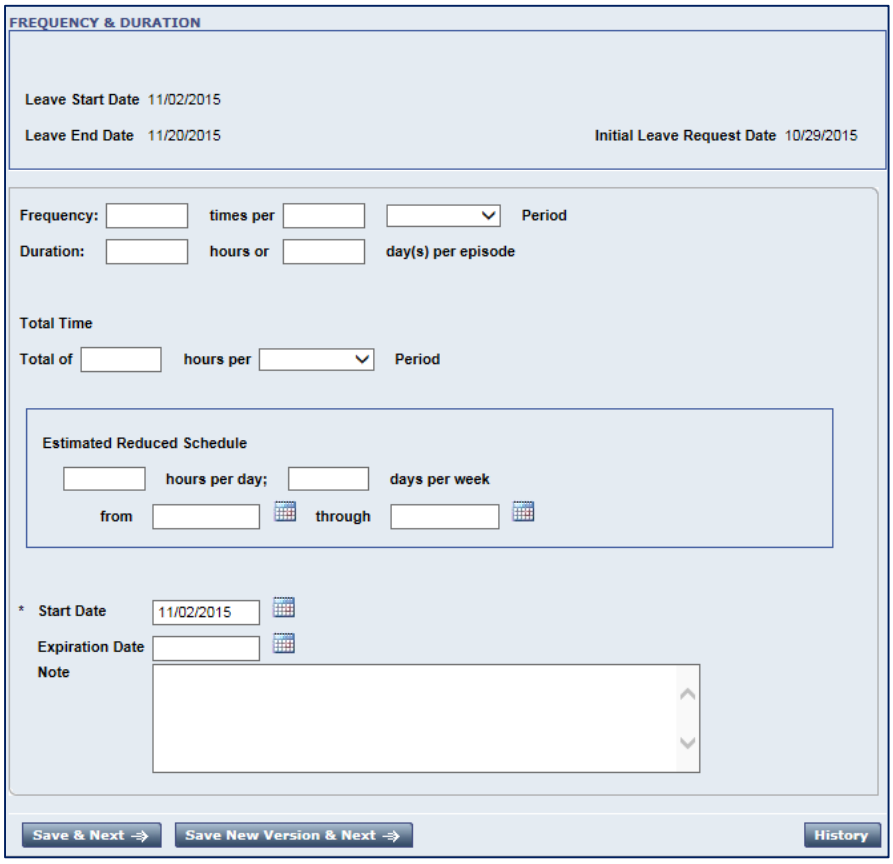
16. Select the appropriate **Leave Document Status** for the documents sent to the employee as well as the status date.



17. Select the **Save & Next** button to go to the **Frequency & Duration** screen.

Frequency & Duration Screen

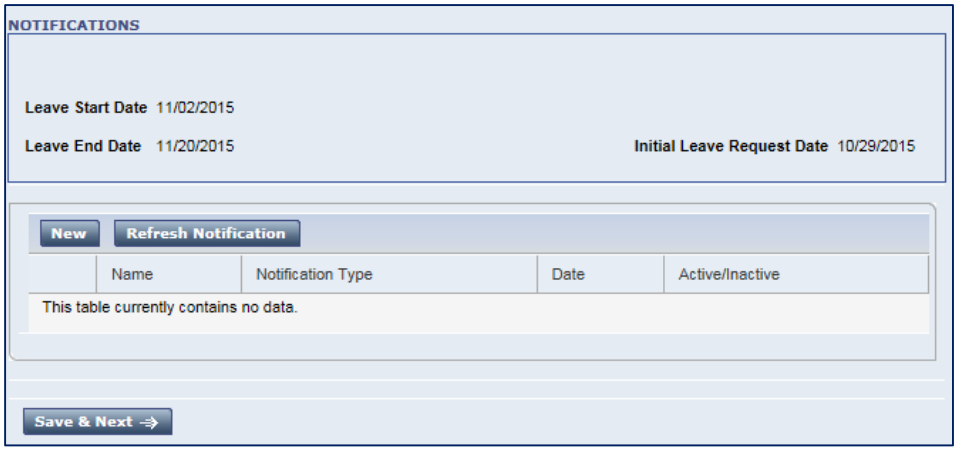
The **Frequency & Duration** screen allows administrators to enter the anticipated frequency and duration of leave episodes in the leave case. This will most commonly be used for intermittent cases.



18. Add any needed information to this screen.
19. Select **Save & Next** to go to the **Notifications** screen.

Notifications Screen

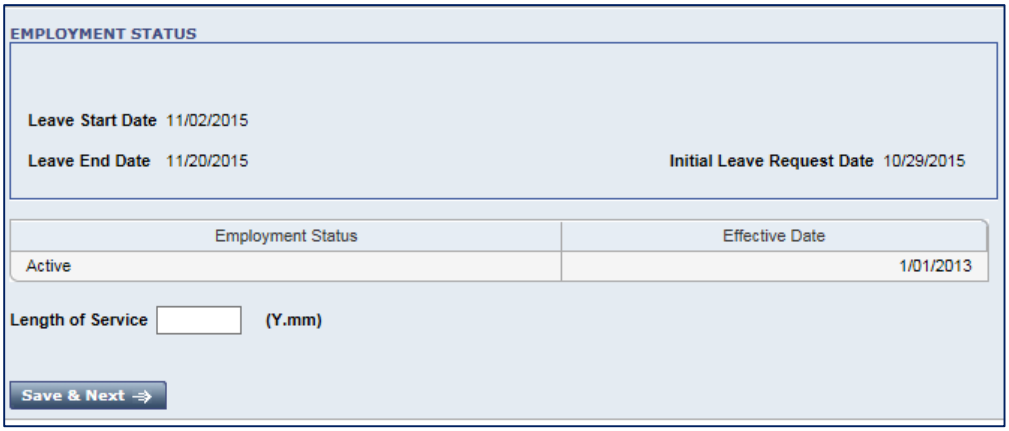
The **Notifications** screen is not currently used.



20. Select the **Save & Next** button to go to the **Employment Status** screen.

Employment Status Screen

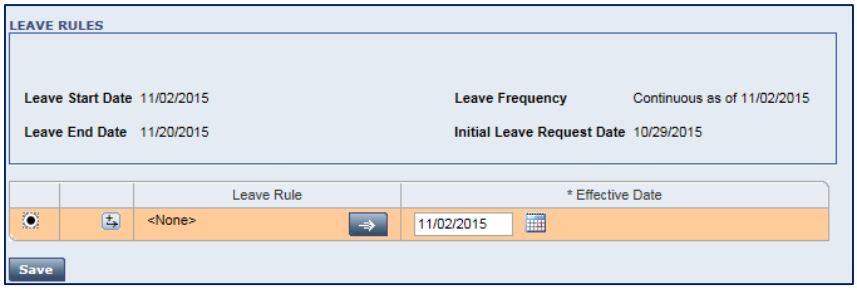
The screen below is informational only. The **Length of Service** may be keyed if desired.



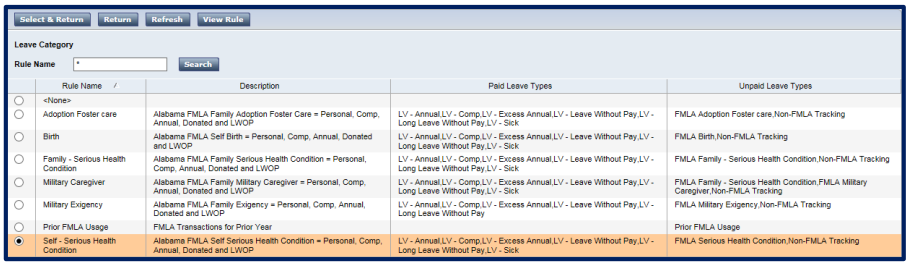
21. Select the **Save & Next** button to go to the **Leave Rules** screen.

Leave Rules Screen

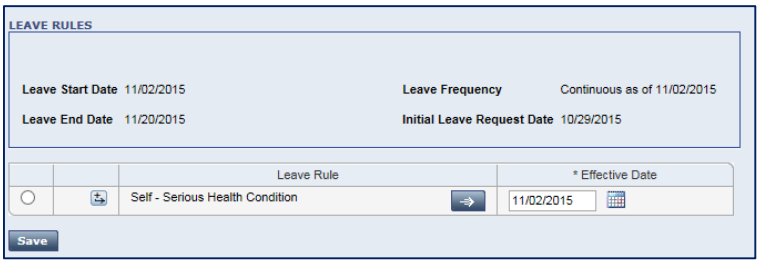
The appropriate leave rule must be selected from the Leave Rule screen.



22. Click on the arrow in the **Leave Rule** column.
23. Once the arrow is selected, the **Select Leave Rule** screen will display.



24. Select the appropriate **Leave Rule** for the case.
25. Click the **Select & Return** button.
26. The leave rule displays on the **Leave Rules** page.
27. **Save** the Leave Rule. At this point the case is now open and active. Time may now be committed to the employee's timecard.



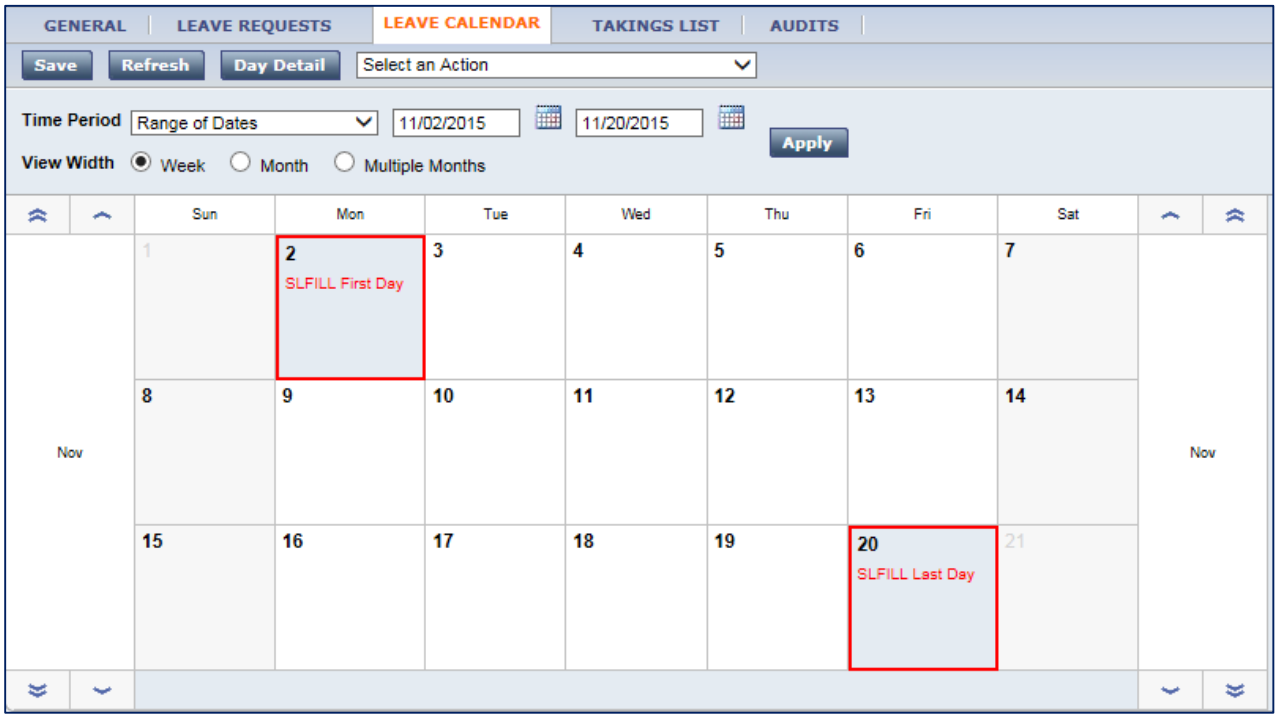
At this point the case has been opened. The next step is to project and commit the time to the employee's timecard.

Projecting and Committing Time from the Leave Calendar

Projecting time from the Leave Calendar

Projecting the time before committing allows the Leave Administrator to see the order the employee's leave will be used. Project the leave time through the end date of the case.

1. Select the **Leave Calendar** tab.
2. When the **Leave Calendar** displays, select or verify the range of dates for the case.

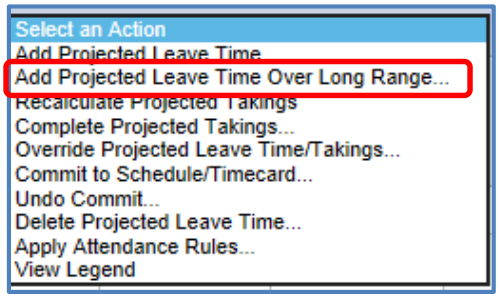


3. Open the **Select an Action** drop-down list to project Leave time.
4. Select **Add Projected Leave Time Over Long Range…** The screen below displays.

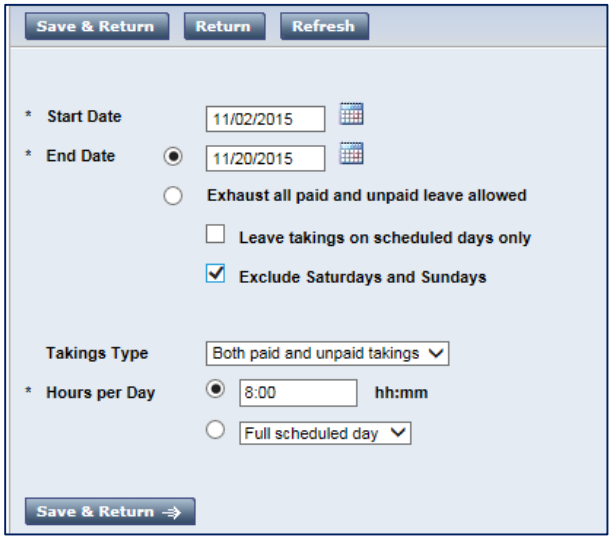
NOTE: To add time to a *continuous* Leave case, select **Add Projected Leave Time Over Long Range…**

Or, if the Leave case is *intermittent*, select **Add Projected Leave Time…** instead. This will add leave time to the first day of the case. Any additional hours may be added at a later date, or by the manager through the Leave Case Editor or directly into the employee's timecard.

An employee may also submit a time off request for an open and approved leave case. See the **Employee Pay Codes for Time Off Requests** job aid for this process.

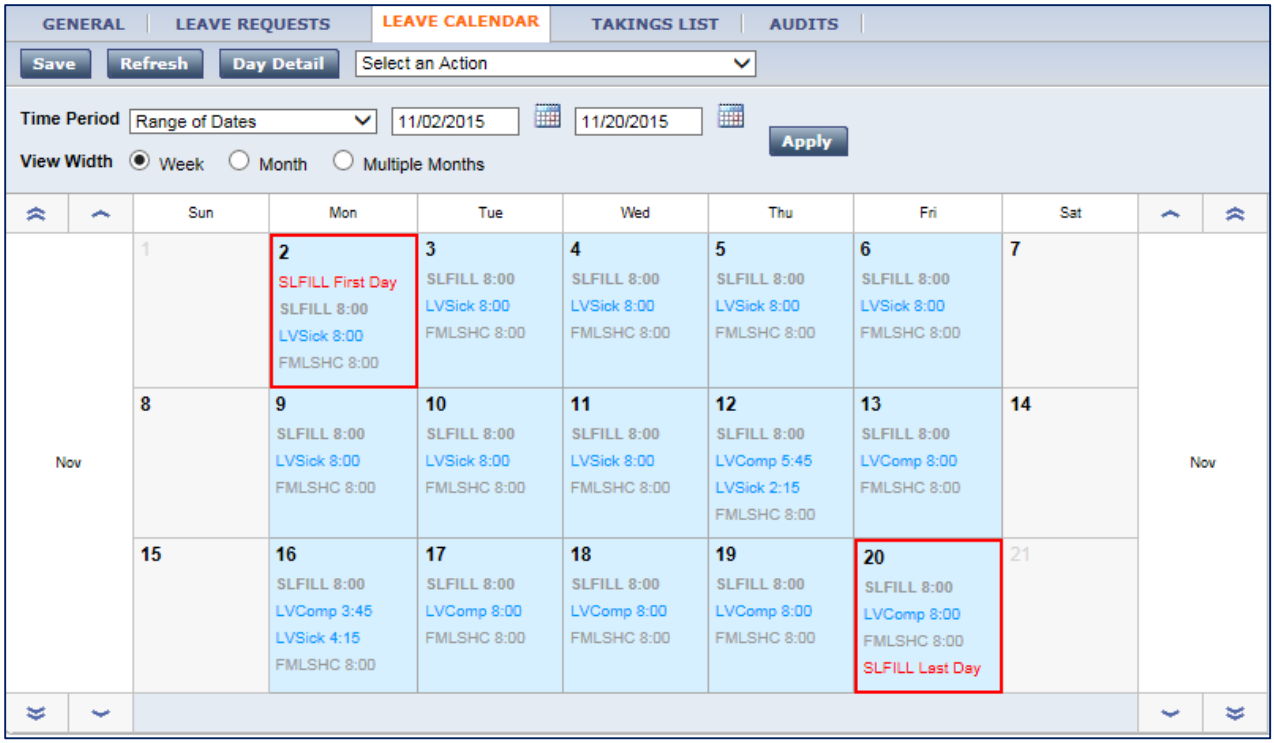


5. Complete the appropriate fields.



6. Select **Save & Return.**

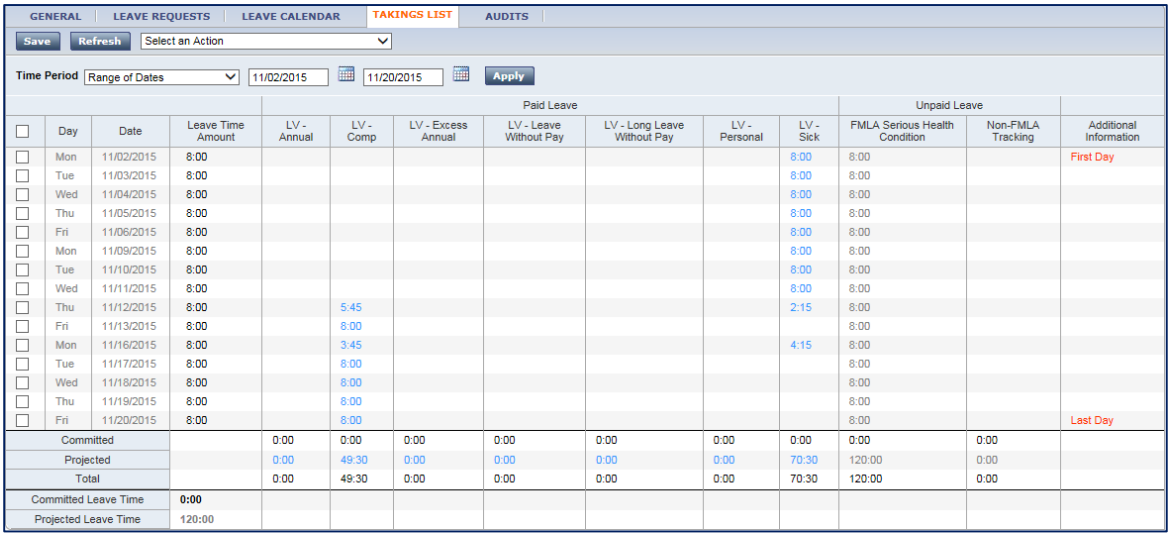
The **Leave Calendar** will be populated with the leave takings. The font will display in light, unbolded colors since the time is "projected" only. Once the time is committed to the Timecard, the font color will display in bold print.



Another way to view the actual leave takings is to select the **Takings List** tab. This screen will provide a better view of the order of the takings.

In the example below, Sick Leave is used first, based on the type of case. Once depleted, the system will use the next available balance, based on the Leave Cascade.

NOTE: See **Extended Leave Cascade** job aid.



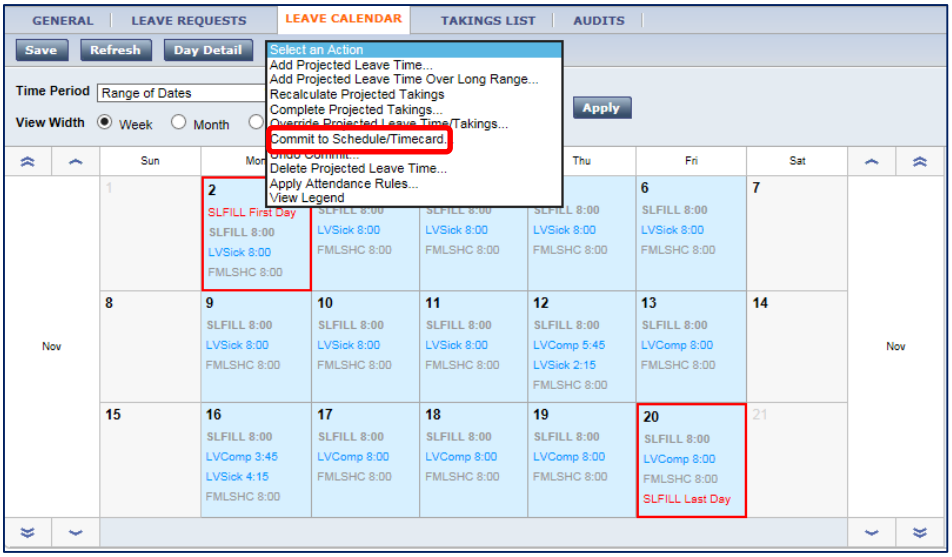
	Day	Date	Leave Time Amount	Paid Leave: LV - Annual	LV - Comp	LV - Excess Annual	LV - Leave Without Pay	LV - Long Leave Without Pay	LV - Personal	LV - Sick	Unpaid Leave: FMLA Serious Health Condition	Non-FMLA Tracking	Additional Information
☐	Mon	11/02/2015	8:00							8:00	8:00		First Day
☐	Tue	11/03/2015	8:00							8:00	8:00		
☐	Wed	11/04/2015	8:00							8:00	8:00		
☐	Thu	11/05/2015	8:00							8:00	8:00		
☐	Fri	11/06/2015	8:00							8:00	8:00		
☐	Mon	11/09/2015	8:00							8:00	8:00		
☐	Tue	11/10/2015	8:00							8:00	8:00		
☐	Wed	11/11/2015	8:00							8:00	8:00		
☐	Thu	11/12/2015	8:00		5:45					2:15	8:00		
☐	Fri	11/13/2015	8:00		8:00						8:00		
☐	Mon	11/16/2015	8:00		3:45					4:15	8:00		
☐	Tue	11/17/2015	8:00		8:00						8:00		
☐	Wed	11/18/2015	8:00		8:00						8:00		
☐	Thu	11/19/2015	8:00		8:00						8:00		
☐	Fri	11/20/2015	8:00		8:00						8:00		Last Day
Committed				0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	
Projected				0:00	49:30	0:00	0:00	0:00	0:00	70:30	120:00	0:00	
Total				0:00	49:30	0:00	0:00	0:00	0:00	70:30	120:00	0:00	
Committed Leave Time			0:00										
Projected Leave Time			120:00										

7. If the leave takings are correct, the time may now be committed to the timecard.

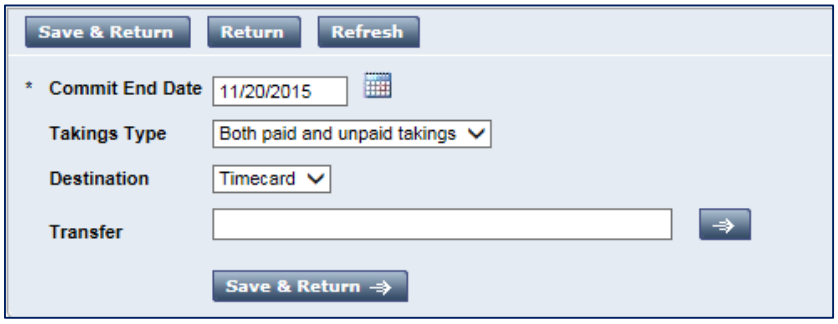
Committing Time for a Continuous Case

Commiting the time allows the Leave Administrator to add time for the leave case to the employee's timecard. Commit the leave time through then end of the **next pay period or the first holiday**, whichever comes first. If desired, the pay codes for the leave may be added directly into the timecard. However, this method ensures the time is used in the order projected.

1. Return to the **Leave Calendar** tab.
2. Click the **End Date** to which time is to be committed in calendar.
3. Select **Commit to Schedule/Timecard…**from the **Select an Action** drop-down.

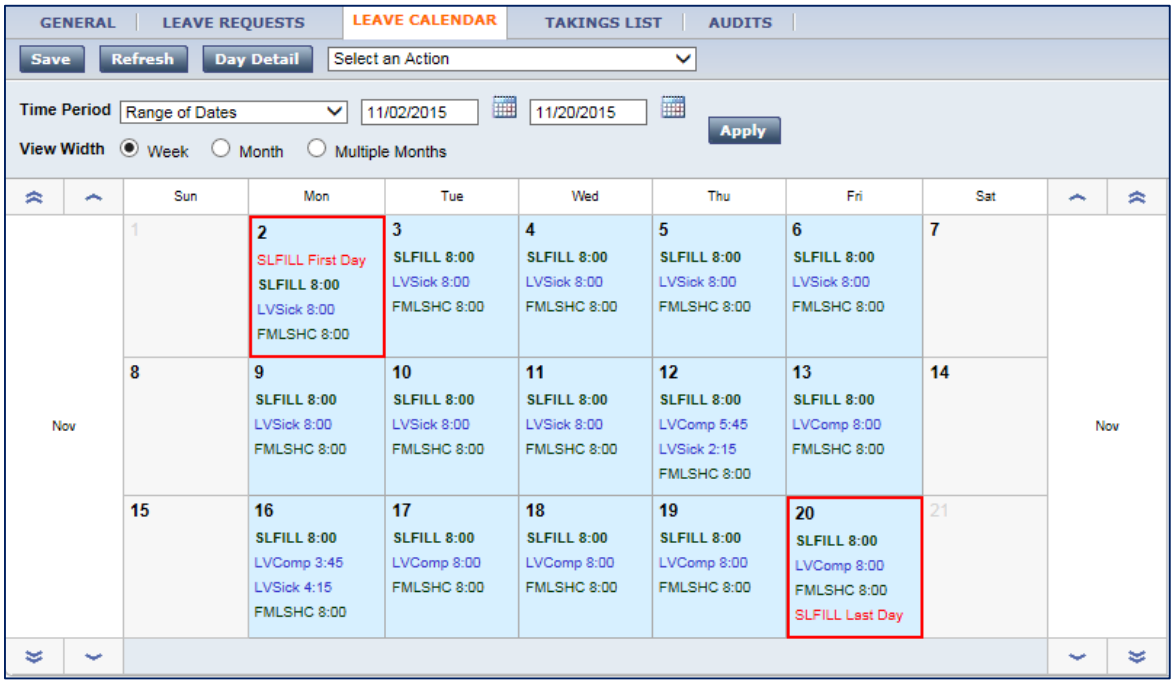


The screen below displays.

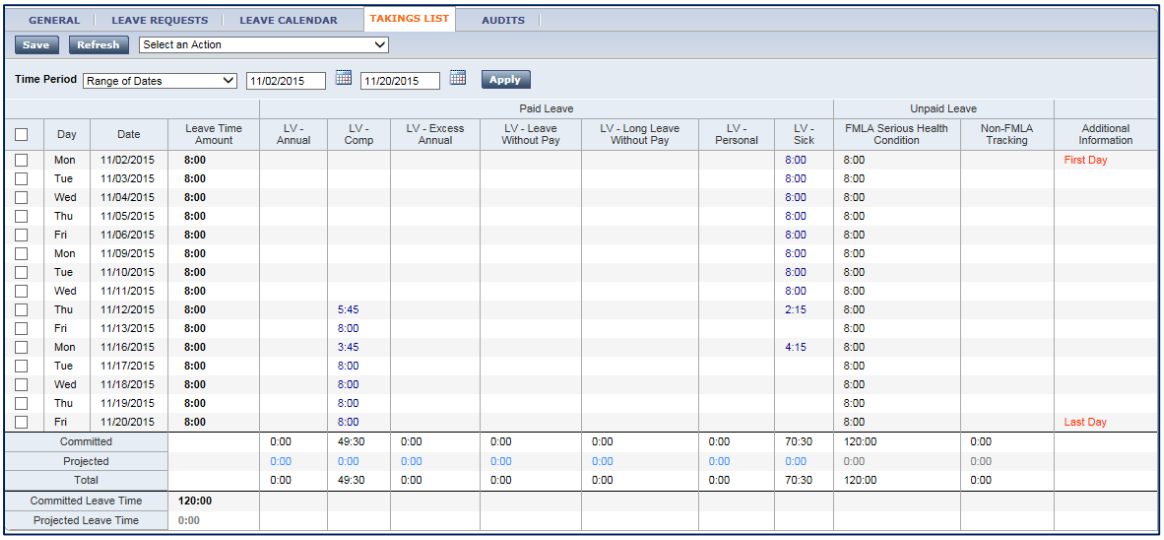


4. Verify or select the end date for the committed time and complete the appropriate fields.
5. Select **Save & Return**.

Leave Calendar view of the same dates. The font displays in dark, bold colors now that the time has been committed to the timecard.



To view the order of the takings, select the **Takings List** tab. Notice that the committed days are darker than the projected days in the screen shot below.



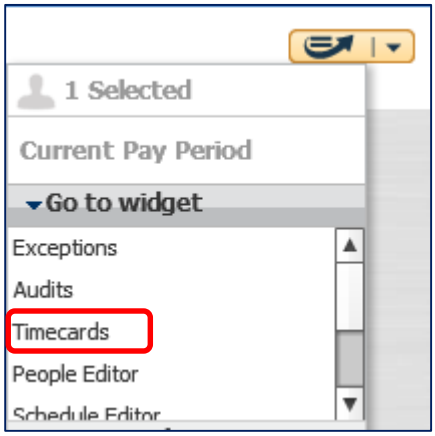
GENERAL | LEAVE REQUESTS | LEAVE CALENDAR | TAKINGS LIST | AUDITS

Save | Refresh | Select an Action

Time Period: Range of Dates | 11/02/2015 | 11/20/2015 | Apply

				Paid Leave							Unpaid Leave		
	Day	Date	Leave Time Amount	LV - Annual	LV - Comp	LV - Excess Annual	LV - Leave Without Pay	LV - Long Leave Without Pay	LV - Personal	LV - Sick	FMLA Serious Health Condition	Non-FMLA Tracking	Additional Information
	Mon	11/02/2015	8:00							8:00	8:00		First Day
	Tue	11/03/2015	8:00							8:00	8:00		
	Wed	11/04/2015	8:00							8:00	8:00		
	Thu	11/05/2015	8:00							8:00	8:00		
	Fri	11/06/2015	8:00							8:00	8:00		
	Mon	11/09/2015	8:00							8:00	8:00		
	Tue	11/10/2015	8:00							8:00	8:00		
	Wed	11/11/2015	8:00							8:00	8:00		
	Thu	11/12/2015	8:00		5:45					2:15	8:00		
	Fri	11/13/2015	8:00		8:00						8:00		
	Mon	11/16/2015	8:00		3:45					4:15	8:00		
	Tue	11/17/2015	8:00		8:00						8:00		
	Wed	11/18/2015	8:00		8:00						8:00		
	Thu	11/19/2015	8:00		8:00						8:00		
	Fri	11/20/2015	8:00		8:00						8:00		Last Day
Committed				0:00	49:30	0:00	0:00	0:00	0:00	70:30	120:00	0:00	
Projected				0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00	
Total				0:00	49:30	0:00	0:00	0:00	0:00	70:30	120:00	0:00	
Committed Leave Time			120:00										
Projected Leave Time			0:00										

6. Select the **Go To** link and select **Timecards** to verify the committed dates.



Timecard for the pay period displays.

Date	Pay Code	Amount	In	Transfer	Out	Shift	Daily	Period
Mon 11/02	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	8:00
Tue 11/03	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	16:00
Wed 11/04	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	24:00
Thu 11/05	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	32:00
Fri 11/06	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	40:00
Sat 11/07								40:00
Sun 11/08								40:00
Mon 11/09	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	48:00
Tue 11/10	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00					8:00	56:00
Wed 11/11	LV - FMLA TRACKING	8:00						
	LV - SICK LEAVE TAKEN	8:00						
	Veterans Day	8:00					16:00	72:00

Best Business Practice

The best practice is to:

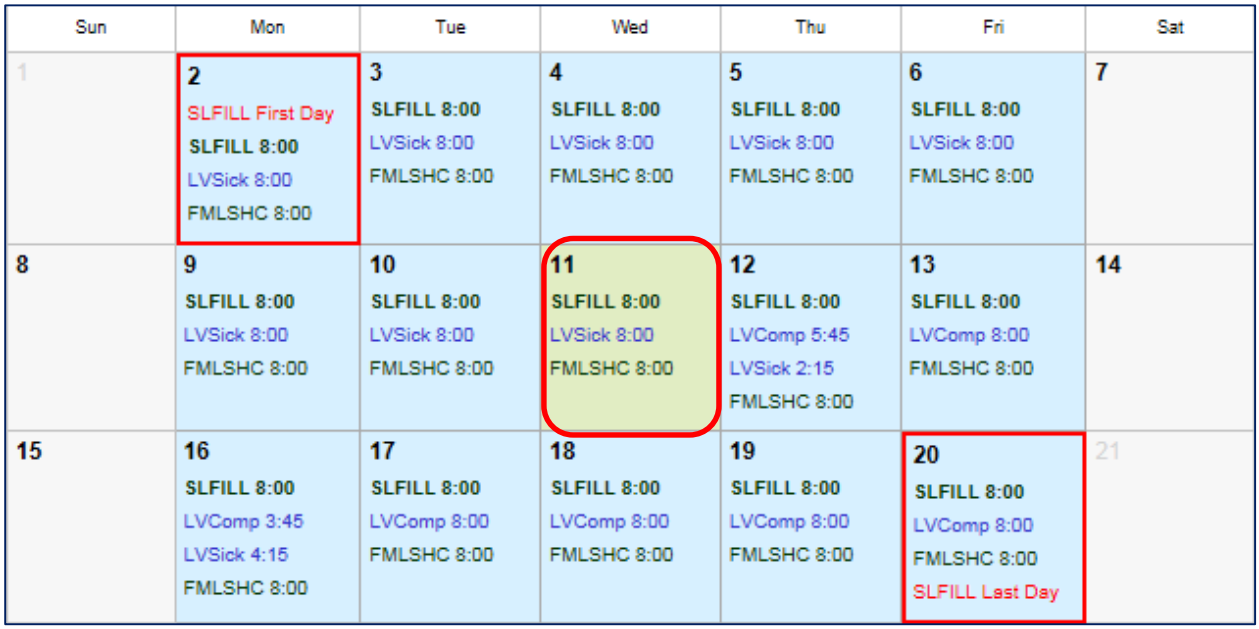
- **Add Projected Time Over Long Range** to the end of the case.
- **Commit** the time through the end of the **next pay period or the first Holiday**, whichever comes first.

Removing Time Committed on a Holiday

If the time was projected for a long range that included a Holiday, it can be easily corrected. In this example, a few extra steps are needed in order for this time to show correctly in the timecard.

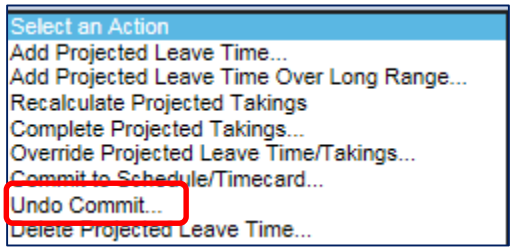
+	Wed 11/11	LV - FMLA TRACKING	8:00
+		LV - SICK LEAVE TAKEN	8:00
+		Veterans Day	8:00

1. In order to correct this, navigate back to the Leave Case Editor.
2. Click on the **Leave Calendar** tab.
3. Click on the **Holiday Date(s)** to select**.**

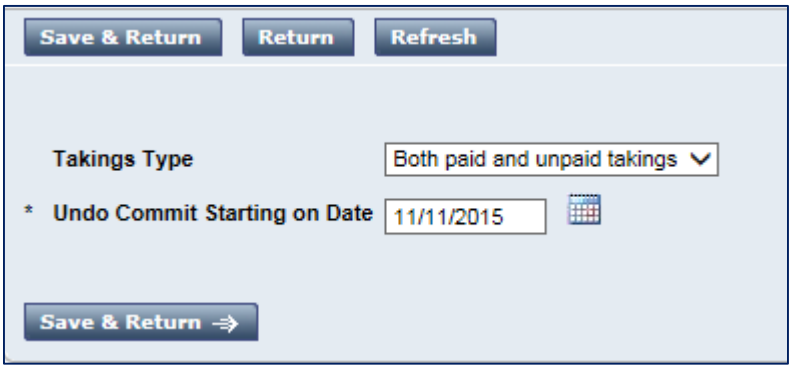


Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	**2** SLFILL First Day **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**3** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**4** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**5** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**6** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**7**
8	**9** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**10** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**11** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**12** **SLFILL 8:00** LVComp 5:45 LVSick 2:15 FMLSHC 8:00	**13** **SLFILL 8:00** LVComp 8:00 FMLSHC 8:00	**14**
15	**16** **SLFILL 8:00** LVComp 3:45 LVSick 4:15 FMLSHC 8:00	**17** **SLFILL 8:00** LVComp 8:00 FMLSHC 8:00	**18** **SLFILL 8:00** LVComp 8:00 FMLSHC 8:00	**19** **SLFILL 8:00** LVComp 8:00 FMLSHC 8:00	**20** **SLFILL 8:00** LVComp 8:00 FMLSHC 8:00 SLFILL Last Day	21

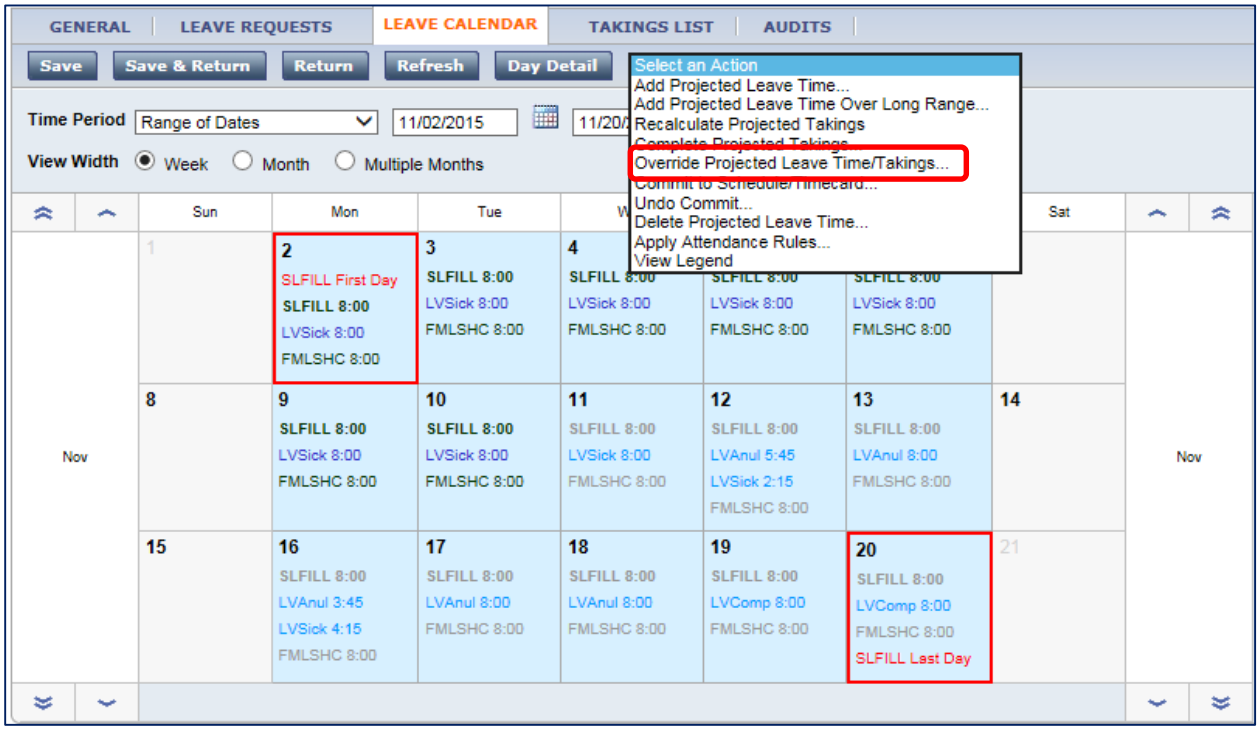
4. Select **Undo Commit** from the **Select an Action** drop-down**.**



5. Verify the date and edit if needed.
6. Then select **Save & Return** from the screen below.

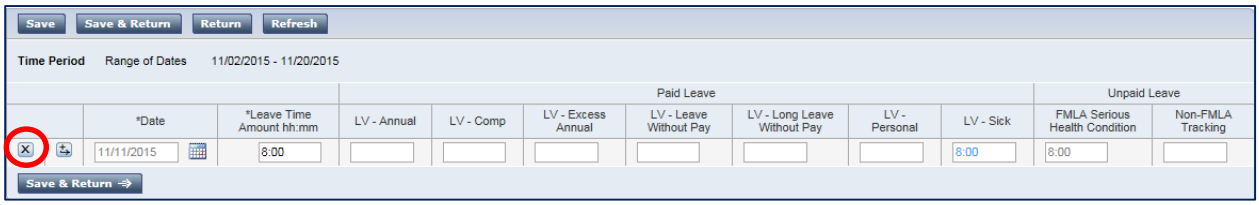


7. Once the time is no longer committed, select the date on the calendar again. Select **Override Projected Leave Time/Takings** from the **Select an Action** drop-down.



8. The **Override Projected Leave Time/Takings** screen will display as below. Delete the amount from any field where one is present or click the **X** on the far left of the row to remove all takings for that date.

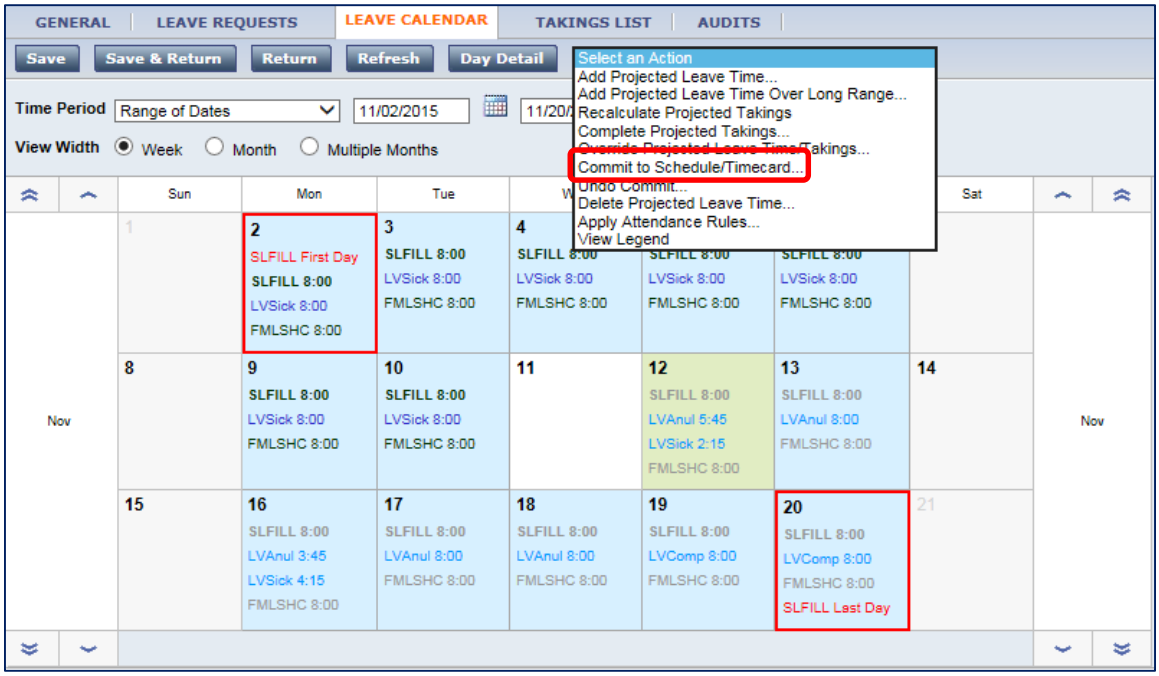
9. Then select **Save & Return**.



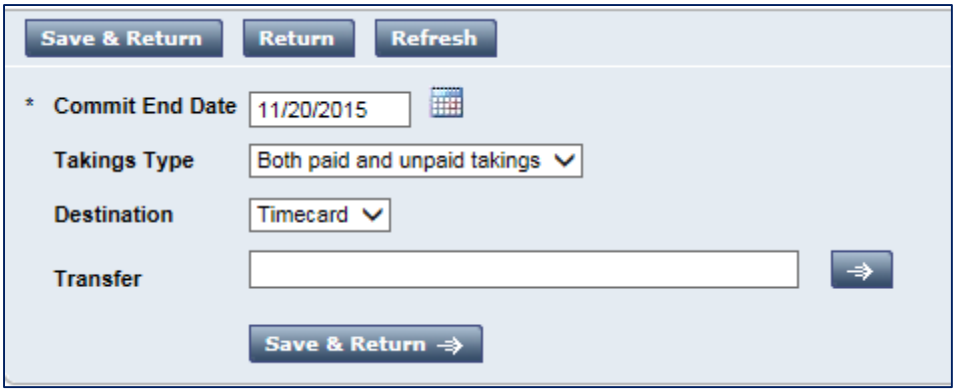
The **Leave Calendar** now displays the 11th correctly.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	**2** SLFILL First Day **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**3** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**4** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**5** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**6** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**7**
8	**9** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**10** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**11**	**12** SLFILL 8:00 LVAnul 5:45 LVSick 2:15 FMLSHC 8:00	**13** SLFILL 8:00 LVAnul 8:00 FMLSHC 8:00	**14**
15	**16** SLFILL 8:00 LVAnul 3:45 LVSick 4:15 FMLSHC 8:00	**17** SLFILL 8:00 LVAnul 8:00 FMLSHC 8:00	**18** SLFILL 8:00 LVAnul 8:00 FMLSHC 8:00	**19** SLFILL 8:00 LVComp 8:00 FMLSHC 8:00	**20** SLFILL 8:00 LVComp 8:00 FMLSHC 8:00 SLFILL Last Day	21

10. The time will now need to be re-committed to the timecard, starting on the day following the holiday, in order to display correctly.

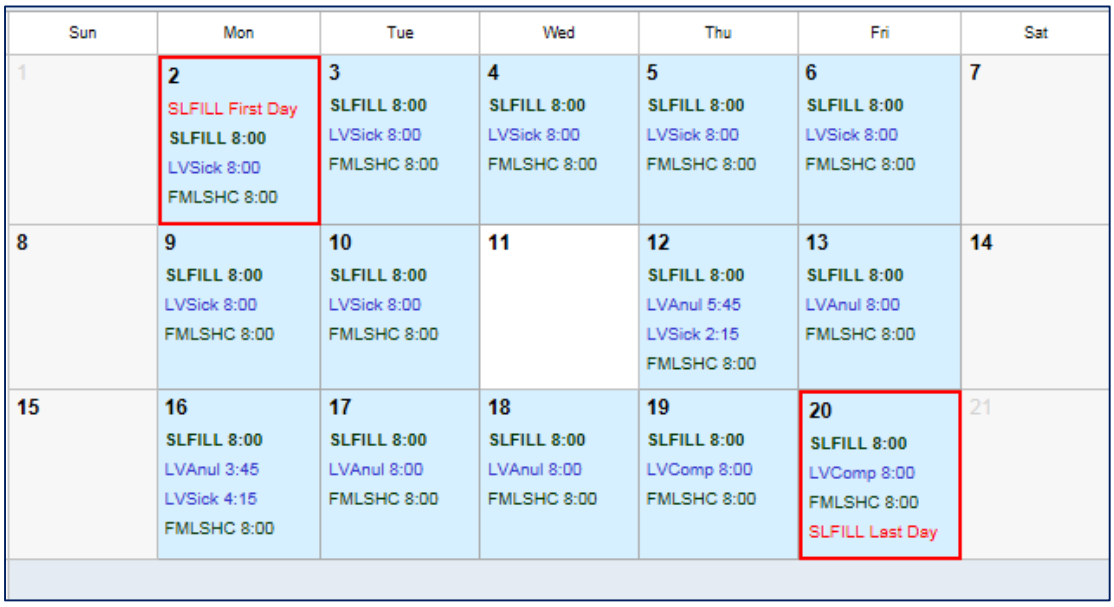


11. Select the **End Date** to which time is to be commited.
12. Select **Commit to Schedule/Timecard** from the **Select an Action** drop-down. The screen below displays.



13. Enter the **Commit End Date** Verify the information on the screen.
14. Select **Save & Return**.

15. Verify the committed time on the calendar.



Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	**2** SLFILL First Day **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**3** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**4** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**5** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**6** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**7**
8	**9** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**10** **SLFILL 8:00** LVSick 8:00 FMLSHC 8:00	**11**	**12** **SLFILL 8:00** LVAnul 5:45 LVSick 2:15 FMLSHC 8:00	**13** **SLFILL 8:00** LVAnul 8:00 FMLSHC 8:00	**14**
15	**16** **SLFILL 8:00** LVAnul 3:45 LVSick 4:15 FMLSHC 8:00	**17** **SLFILL 8:00** LVAnul 8:00 FMLSHC 8:00	**18** **SLFILL 8:00** LVAnul 8:00 FMLSHC 8:00	**19** **SLFILL 8:00** LVComp 8:00 FMLSHC 8:00	**20** **SLFILL 8:00** LVComp 8:00 FMLSHC 8:00 SLFILL Last Day	21

View the employee timecard to verify that the Holiday is displaying correctly and no longer has committed leave time for that day.

		Date	Pay Code	Amount	In	Transfer	Out	Shift	Daily	Period
+	x	Mon 11/09	LV - FMLA TRACKING	8:00						
+	x		LV - SICK LEAVE TAKEN	8:00					8:00	8:00
+	x	Tue 11/10	LV - FMLA TRACKING	8:00						
+	x		LV - SICK LEAVE TAKEN	8:00					8:00	16:00
+	x	Wed 11/11	Veterans Day	8:00					8:00	24:00
+	x	Thu 11/12	LV - ANNUAL LEAVE TAK...	5:45						
+	x		LV - FMLA TRACKING	8:00						
+	x		LV - SICK LEAVE TAKEN	2:15					8:00	32:00
+	x	Fri 11/13	LV - ANNUAL LEAVE TAK...	8:00						
+	x		LV - FMLA TRACKING	8:00					8:00	40:00

Other Types of Leave Cases

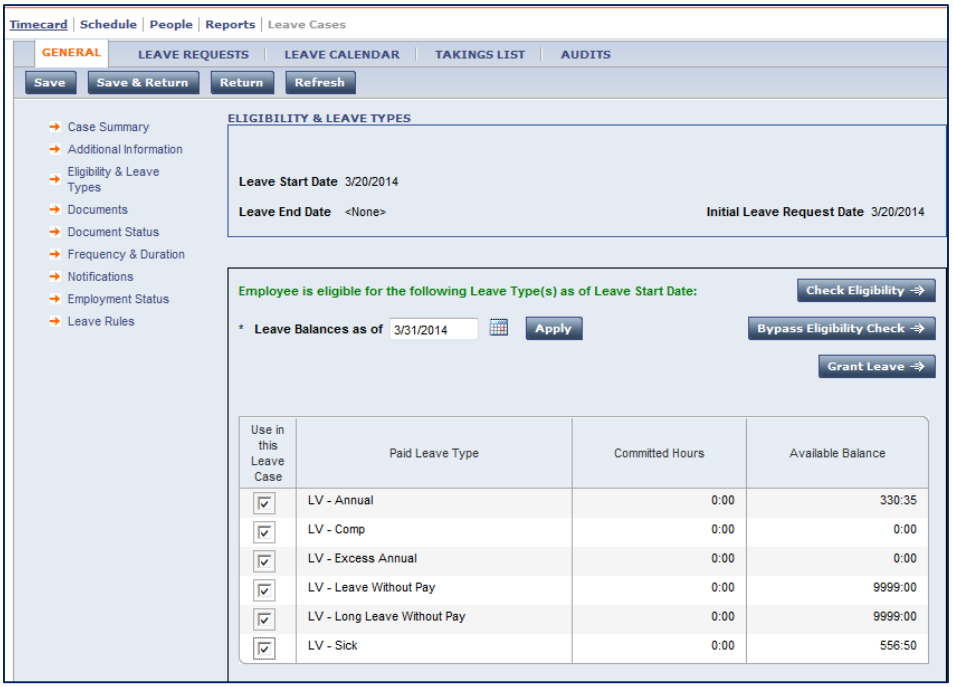
Purpose

The information below pertains to other types of leave cases that may be needed.

FMLA Long Leave Without Pay

Using the Leave Cascade

To use the Leave Cascade, the **Paid Leave Types** should remain selected.

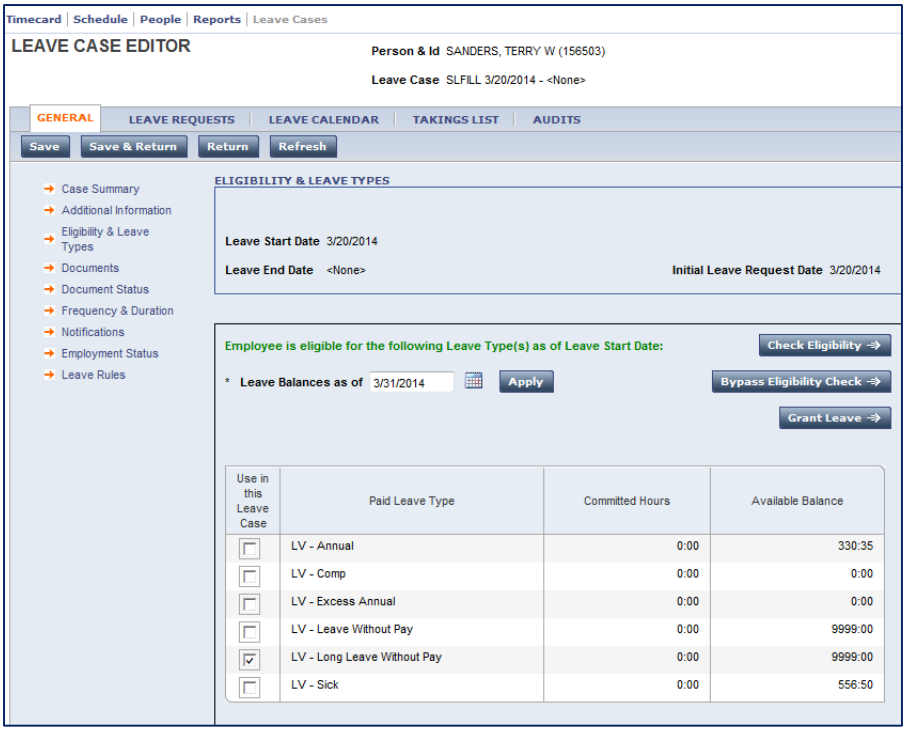


NOTE: If **LV – Long Leave Without Pay** is selected **with** other leave types that **have a balance**, only the other types will be used. That is **LV-Long Leave Without Pay** will **NOT** be used.

But, if **LV – Long Leave Without Pay** is selected **with** other leave types that **DO NOT** have a balance, only **LV – Long Leave Without Pay** will be used.

Using Long Leave Without Pay

In order to use **LV-Long Leave Without Pay**, all other **Paid Leave Types** must be **unchecked.** That is, uncheck all "Paid Leave Types" EXCEPT **LV-Long Leave Without Pay.**



NOTE: If **LV – Long Leave Without Pay** is selected **with** other leave types that **have a balance**, only the other types will be used. Since **LV-Long Leave Without Pay** will **NOT** be used, it should be unchecked.

But, if **LV – Long Leave Without Pay** is selected **with** other leave types that **DO NOT** have a balance, then only **LV – Long Leave Without Pay** will be used.

Non-FMLA Long Leave Without Pay

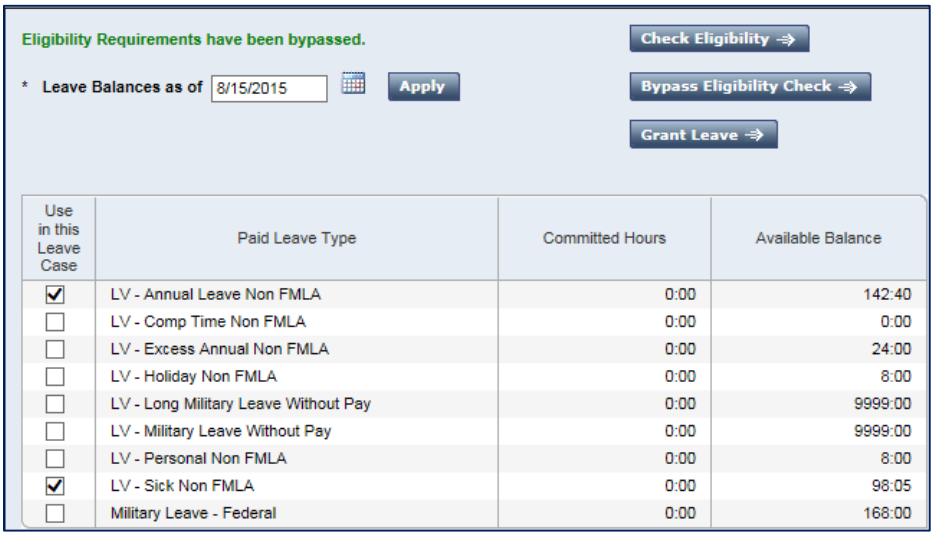
If an employee has been on leave without pay that is not related to an FMLA case for 19 consecutive days, there is no leave case to be opened in eSTART. From the employee's timecard, select the **ULLWP-Tracking** pay code for tracking purposes only.

Military Leave

Military Leave does not cascade through the leave types. Since all paid leave types are selected by default, any that are not to be used **must be unselected**.

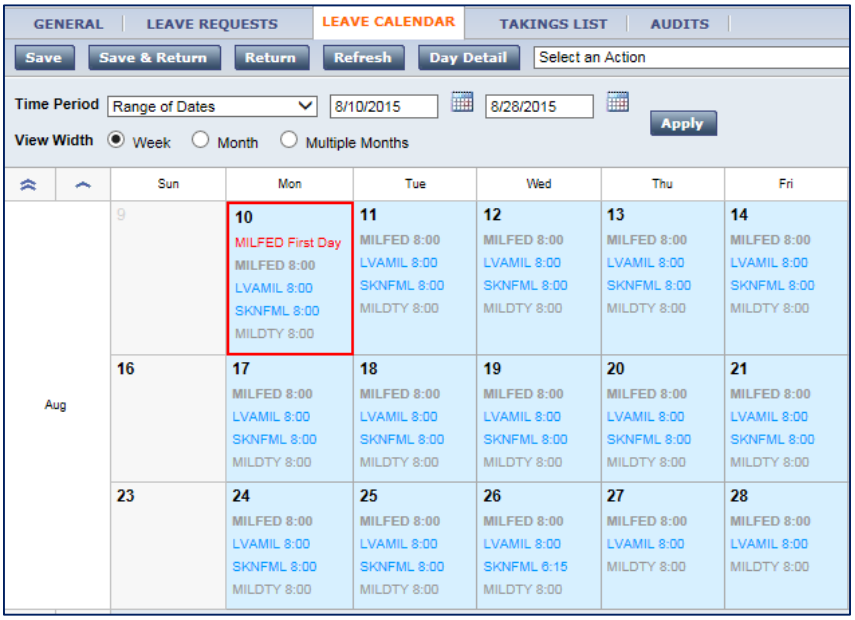
NOTE: If more than one paid leave type remains selected, ALL selected types will be used. That is, the employee will be erroneously charged time from each selected type.

For example, two paid types are selected in the screen shot below.

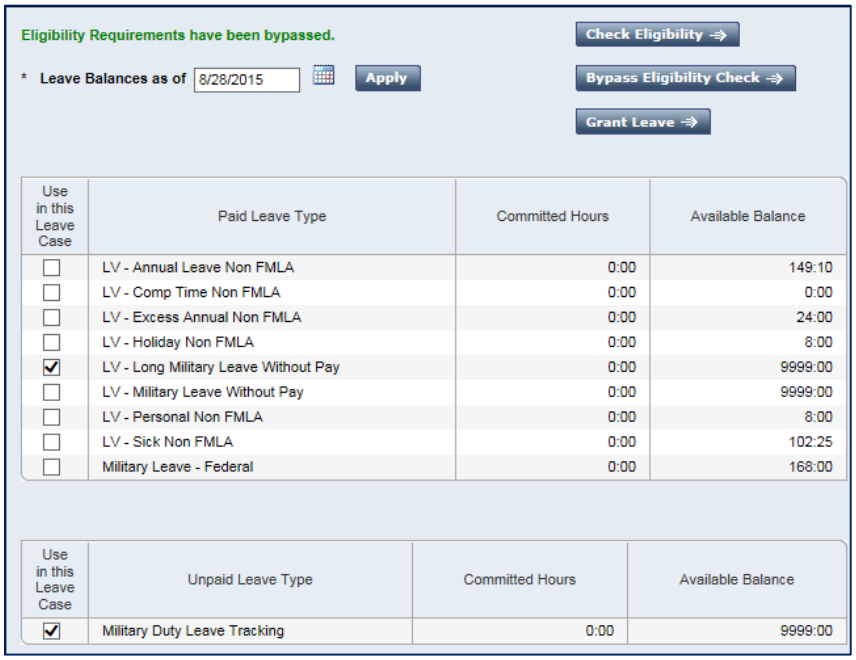


Use in this Leave Case	Paid Leave Type	Committed Hours	Available Balance
☑	LV - Annual Leave Non FMLA	0:00	142:40
☐	LV - Comp Time Non FMLA	0:00	0:00
☐	LV - Excess Annual Non FMLA	0:00	24:00
☐	LV - Holiday Non FMLA	0:00	8:00
☐	LV - Long Military Leave Without Pay	0:00	9999:00
☐	LV - Military Leave Without Pay	0:00	9999:00
☐	LV - Personal Non FMLA	0:00	8:00
☑	LV - Sick Non FMLA	0:00	98:05
☐	Military Leave - Federal	0:00	168:00

The result of selecting two paid leave type codes above is that **all selected types will be charged**. In the screen shot below, the codes in blue text indicate the time that will be charged from each type. **This employee would be charged twice in error.**

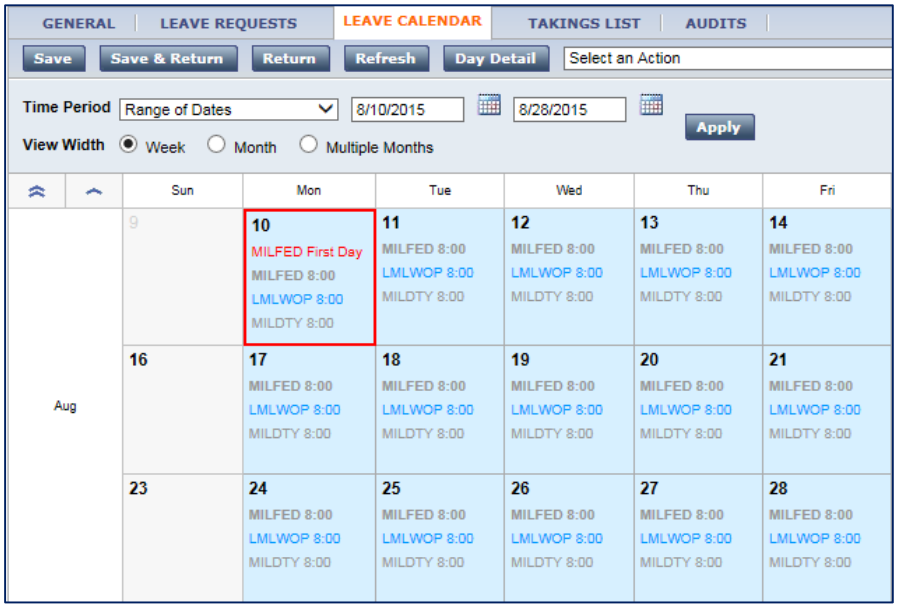


The correct way to do this is to use only one type. In the following example, **LV-Long Military Leave Without Pay** will be used. All other paid leave types must be unchecked. The **Military Duty Leave Tracking** code is an unpaid leave type and must remain selected. For each military case, one paid leave type and one unpaid leave type must be seleted.



Once takings have been projected, the calendar displays with leave time charged only to one paid leave type. This is correct. The time can now be committed to the timecard.

NOTE: If any projected, uncommitted time is in the calendar when a leave type is changed, the projected, uncommitted time **will be changed** to the new leave type. Committed time will not be changed.



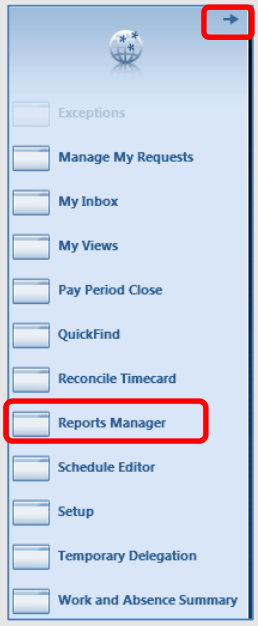
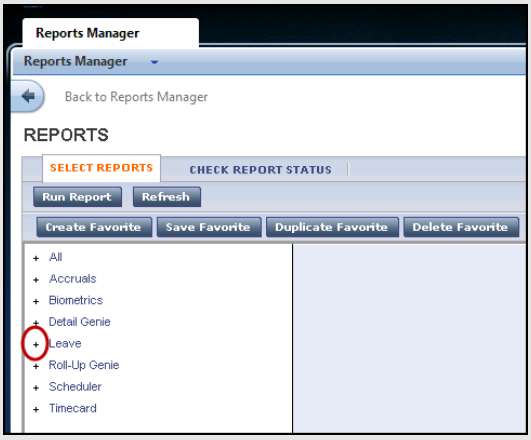
Generating Leave Reports

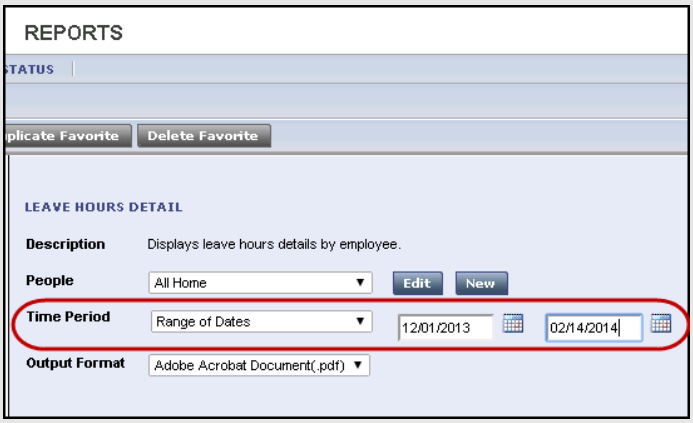
Purpose

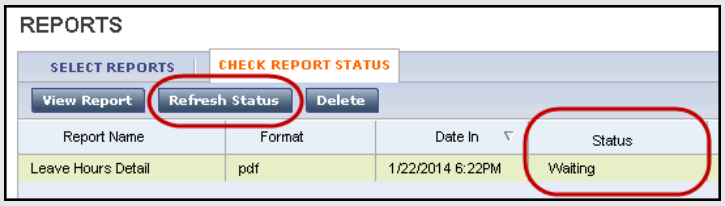
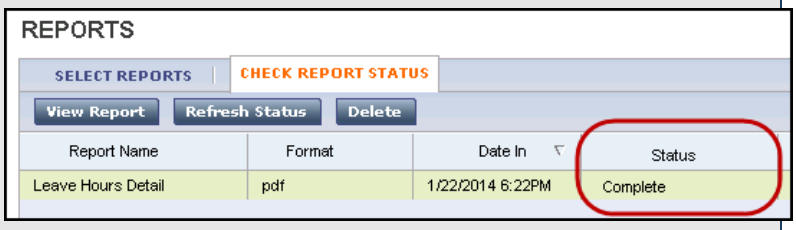
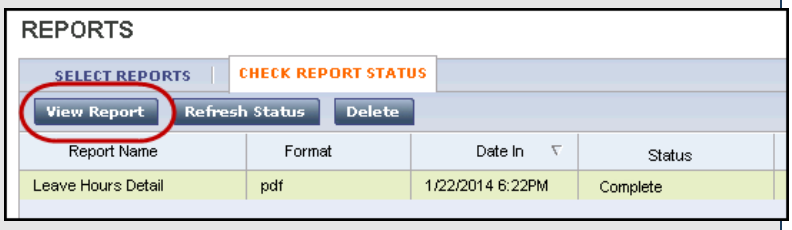
Employee leave information is available in several different leave reports. You can generate leave reports on a daily, weekly, or pay-period basis, or any time you need information to accomplish your business tasks. For example, you can run the **Leave Hours Detail** report to review the types of leave hours for each shift that has been committed to an employee's timecard.

Example

You want to review Sandy Stamp's leave hours for each shift since she began her leave of absence on December 1st. Generate the **Leave Hours Detail** report to view this information.

Steps		
1	In the **Related Items** pane, click the **arrow** to expand the pane, and select **Reports Manager**.	
2	On the **Select Report** tab, click the plus sign **(+)** next to **Leave** to expand the category.	

Steps		
3	Select the **Leave Hours Detail** report.	
4	From the **People** drop-down list, select the group of employees whose leave hours you want to view.	
5	From the Time Period drop-down list, select the time period, or select **Range of Dates** and enter a 30-day time span using **today's date** for the start date.	
6	Click **Run Report**.	

Steps		
7	You are redirected to the **Check Report Status** tab. Review information in the **Status** column. Click **Refresh Status**. Wait until **Complete** displays in the **Status** column.	 
8	To view the report, click the report name and select **View Report**. (Sample leave reports display in the following section.)	
9	(Optional) To print the report, click the print icon on the floating menu bar.	

Sample Leave Reports

Leave Hours Detail

The **Leave Hours Detail** report lists detailed leave information for employees with open or closed leave cases for the requested time period.

Use the **Leave Hours Detail** report when you want to view leave information included in the Leave Cases View and the Leave Hours View, in one convenient report.

The report is sorted alphabetically by employee and includes (but is not limited to):

- Leave Case Status
- Leave Type
- Leave Type Amount
- Leave Category
- Leave Reason
- Committed Hours
- Additional Information

The following illustration is an example of the **Leave Hours Detail** report.

Leave Hours Detail

Executed on: 1/22/2014 5:22PM GMT-06:00
Printed for: JohnA.Manager1

Time Period: 12/01/2013 - 2/14/2014
Query: All Home

Leave Case Status	Leave Category	Leave Case Reason	Leave Frequency	Leave Case Code	Initial Leave Request Date	Leave Start Date	Leave End Date	Latest Committed Date/Paid Leave	Latest Committed Date/Unpaid Leave
Stamp1, SandyA			ID:	10401					
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		2/5/2014	2/5/2014

Day	Date	Indicator	Leave Time Amount	Leave Type	Committed Hours	Additional Information
Rule: Family - Serious Health Condition as of 12/1/2013						
Sun	12/1/2013					First Day
Mon	12/2/2013		8:00	LV - Sick	8:00	
				FMLA Family - Serious Health Condition	8:00	
Wed	2/5/2014		4:00	LV - Sick	4:00	
				FMLA Family - Serious Health Condition	4:00	

Leave Case Totals for Selected Time Period

Leave Type	Total Committed Hours
LV - Sick	12:00
FMLA Family - Serious Health	12:00
Committed Leave Time:	12:00

Total Number of Employees: 1

Leave Hours Summary

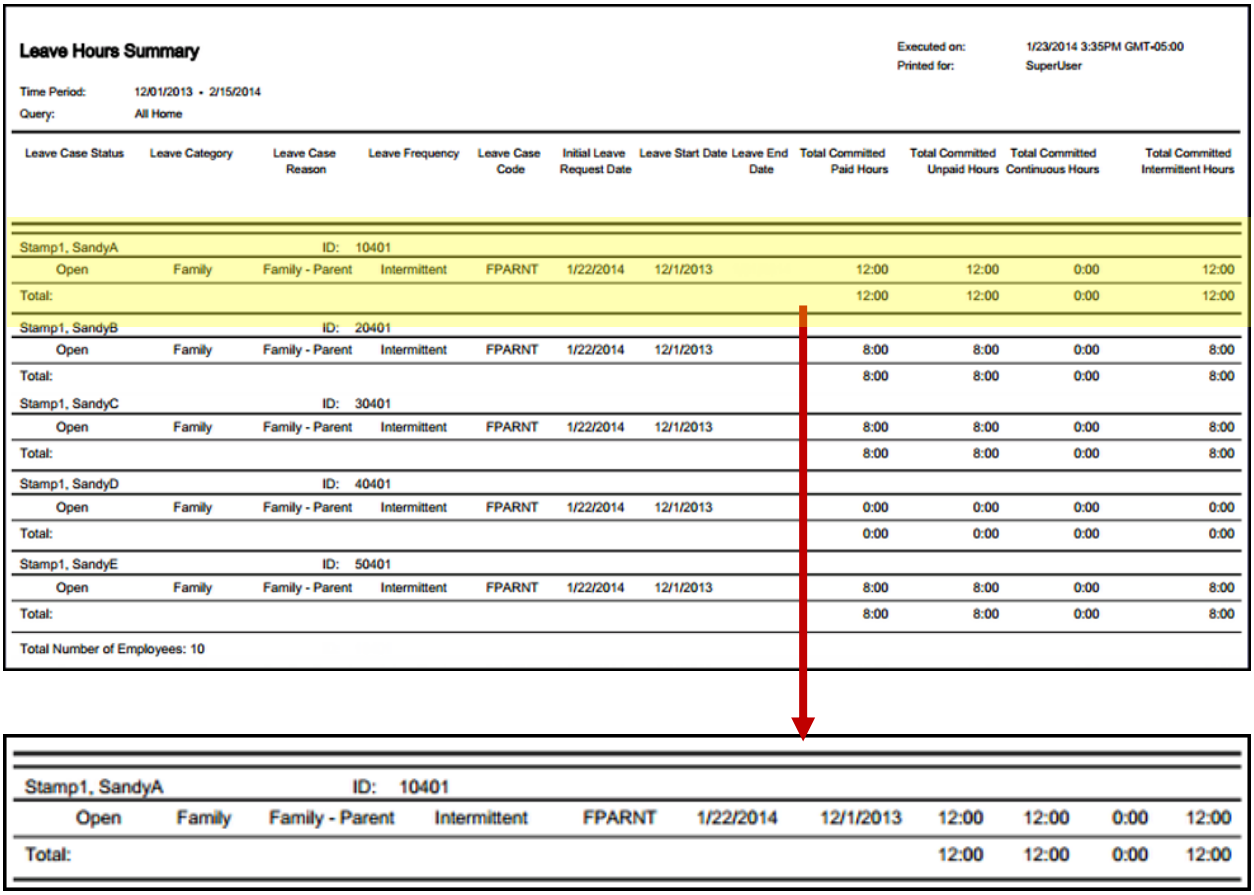
The **Leave Hours Summary** report lists, for each employee, all open or closed leave cases in the requested time period, as well as any requested leave cases in the requested time period.

Use the **Leave Hours Summary** report to itemize and record total committed hours in a specified time period.

The report is sorted alphabetically by employee and includes (but is not limited to):

- Leave Case Status
- Leave Category
- Leave Reason
- Total Committed Continuous Hours
- Total Committed Intermittent Hours

The following illustration is an example of the **Leave Hours Summary** report.



Leave Hours Summary

Executed on: 1/23/2014 3:35PM GMT-05:00
Printed for: SuperUser

Time Period: 12/01/2013 - 2/15/2014
Query: All Home

Leave Case Status	Leave Category	Leave Case Reason	Leave Frequency	Leave Case Code	Initial Leave Request Date	Leave Start Date	Leave End Date	Total Committed Paid Hours	Total Committed Unpaid Hours	Total Committed Continuous Hours	Total Committed Intermittent Hours
Stamp1, SandyA		ID: 10401									
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		12:00	12:00	0:00	12:00
Total:								12:00	12:00	0:00	12:00
Stamp1, SandyB		ID: 20401									
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00
Total:								8:00	8:00	0:00	8:00
Stamp1, SandyC		ID: 30401									
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00
Total:								8:00	8:00	0:00	8:00
Stamp1, SandyD		ID: 40401									
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		0:00	0:00	0:00	0:00
Total:								0:00	0:00	0:00	0:00
Stamp1, SandyE		ID: 50401									
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00
Total:								8:00	8:00	0:00	8:00

Total Number of Employees: 10

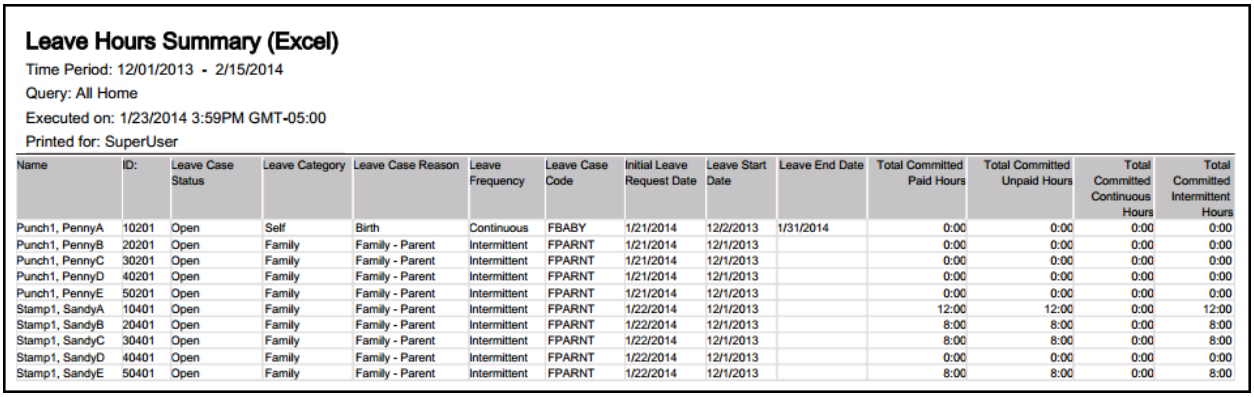
Stamp1, SandyA		ID: 10401								
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013	12:00	12:00	0:00	12:00
Total:							12:00	12:00	0:00	12:00

Leave Hours Summary (Excel)

The options and report content in the **Leave Hours Summary (Excel)** report are the same as the Leave Hours Summary report.

Use the **Leave Hours Summary (Excel)** report if you plan to export the results to Excel for further sorting and analysis.

The following illustration is an example of the **Leave Hours Summary (Excel)** report.



Leave Hours Summary (Excel)

Time Period: 12/01/2013 - 2/15/2014

Query: All Home

Executed on: 1/23/2014 3:59PM GMT-05:00

Printed for: SuperUser

Name	ID:	Leave Case Status	Leave Category	Leave Case Reason	Leave Frequency	Leave Case Code	Initial Leave Request Date	Leave Start Date	Leave End Date	Total Committed Paid Hours	Total Committed Unpaid Hours	Total Committed Continuous Hours	Total Committed Intermittent Hours
Punch1, PennyA	10201	Open	Self	Birth	Continuous	FBABY	1/21/2014	12/2/2013	1/31/2014	0:00	0:00	0:00	0:00
Punch1, PennyB	20201	Open	Family	Family - Parent	Intermittent	FPARNT	1/21/2014	12/1/2013		0:00	0:00	0:00	0:00
Punch1, PennyC	30201	Open	Family	Family - Parent	Intermittent	FPARNT	1/21/2014	12/1/2013		0:00	0:00	0:00	0:00
Punch1, PennyD	40201	Open	Family	Family - Parent	Intermittent	FPARNT	1/21/2014	12/1/2013		0:00	0:00	0:00	0:00
Punch1, PennyE	50201	Open	Family	Family - Parent	Intermittent	FPARNT	1/21/2014	12/1/2013		0:00	0:00	0:00	0:00
Stamp1, SandyA	10401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		12:00	12:00	0:00	12:00
Stamp1, SandyB	20401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00
Stamp1, SandyC	30401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00
Stamp1, SandyD	40401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		0:00	0:00	0:00	0:00
Stamp1, SandyE	50401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00

Other available reports are:

- **Employee Leave Document Due Dates** - displays leave document due dates by employee.
- **Leave Task List** – displays a list of notifications in order of notification date.
- **Leave Trends** – shows trends in employee leave time for continuous and intermittent leave cases, including charts and graphs.

NOTES